

Joint Legacy Viewer (JLV) 2.7

User Guide



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Revision History

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Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the user guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it is updated as needed. A user guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. It is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The user guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

Table of Contents

1. Introduction	1
1.1. Purpose of the Guide.....	1
1.1.1. Guide Conventions	2
1.1.2. Terminology.....	2
1.2. Assumptions	2
1.3. System Requirements	2
1.4. Getting Help.....	3
2. Logging in to JLV	4
2.1. VHA User Login.....	4
2.2. VBA User Login.....	6
2.3. Editing Your User Profile at Login	6
2.3.1. Selecting a Data Source	8
2.3.2. Selecting a UI Theme	8
2.4. Logging Out of the Current JLV Session	8
3. The Elements and Functionality of JLV	8
3.1. The JLV Portal Pages	8
3.1.1. Default View.....	9
3.1.2. System Menu	10
3.1.3. Viewing System Status.....	10
3.1.4. Patient Context Management.....	12
3.1.4.1. Suspending Context.....	12
3.1.4.2. Establishing Context	13
3.1.4.3. Unable to Communicate with Vault.....	13
3.1.4.4. Context Synchronization Failure.....	14
3.2. Customizing JLV	15
3.2.1. Setting the Data Source.....	15
3.2.2. Setting the UI Theme	15
3.2.3. Using the Accessible Theme’s Functionality	18
3.2.3.1. Keyboard Focus and Screen Navigation.....	18
3.2.3.2. Accessible Theme Screen Navigation	19
3.3. User-Restricted Access to Patient Data	21
3.3.1. VHA Users Viewing DoD-only Patients	21
3.3.2. VBA Users Viewing Patients with DoD Data	21
3.3.3. Access to DoD Sensitive Records.....	22
3.4. Patient Searches	23
3.4.1. PDWS Search Rules and Supported Searches	24
3.4.2. MVI Search Guidelines	24

3.4.3.	Patient Search Using DoD ID	24
3.4.4.	Patient Search Using SSN.....	25
3.4.5.	Advanced Patient Search Options	27
3.4.6.	Family Member Search	28
3.4.7.	Recently Viewed Patients List	29
4.	Widgets	31
4.1.	Accessing and Opening Widgets.....	31
4.2.	Widget Navigation and Display Options.....	32
4.3.	Widget Toolbars	33
4.4.	Minimized vs. Expanded Widget View	33
4.4.1.	Date Range Filters.....	34
4.4.1.1.	Quick Date Range Filter	35
4.4.1.2.	Start and End Date Filter.....	35
4.4.2.	Text Filter	37
4.5.	Viewing Connection Status.....	38
4.6.	Displaying Widgets on Custom Tabs.....	40
4.7.	Refreshing Data in a Widget	41
4.8.	VistA Imaging Viewer	41
4.9.	Using Report Builder.....	42
4.9.1.	Adding Multiple Records with EZ Select	44
4.9.2.	Adding Sensitive Records	46
4.9.3.	Adding One Record	46
4.9.4.	Adding Only Record Details or Notes	46
4.9.5.	Adding Patient Demographics.....	47
4.9.6.	Generating a Report	47
4.9.7.	Opening a Report.....	50
4.9.8.	Delete a Report.....	50
4.10.	Printing	51
5.	Widget Functionality	52
5.1.	Patient Demographics Widget.....	52
5.1.1.	Patient Flags and Alerts	52
5.1.2.	Race Data Terminology Normalization	54
5.1.3.	Viewing Third-Party Insurance Information	54
5.2.	Documents Widget	55
5.2.1.	Documents Widget Data.....	56
5.2.2.	Viewing Documents.....	57
5.2.3.	Viewing DoD Sensitive Data	58
5.2.4.	Display and Filter Options.....	58
5.2.5.	Terminology Normalization.....	59

5.3.	Community Health Summaries and Documents - VA	60
5.3.1.	Community Health Summaries and Documents - VA Widget Data.....	60
5.3.2.	Viewing VA Community Health Summary Documents.....	61
5.4.	Military Health System (MHS) GENESIS Widget	62
5.4.1.	MHS GENESIS Widget Data	62
5.4.2.	Viewing MHS GENESIS Documents.....	63
6.	Troubleshooting.....	65
6.1.	Special Instructions for Error Correction.....	65
6.1.1.	Login Page Error Messages.....	66
6.1.2.	System Error Messages	68
6.1.3.	VA VHIE Server Error Message.....	69
A.	Acronyms and Abbreviations	70
B.	Patient Portal Widgets, Columns, and Supported Views	72

Table of Figures

Figure 1:	SSOi Page for VA Users.....	5
Figure 2:	Edit Profile Link on the JLV Login Page	7
Figure 3:	User Profile Data Source and User Interface Option Fields.....	7
Figure 4:	JLV Log Out Icon.....	8
Figure 5:	References Widget.....	9
Figure 6:	JLV Tools on the Portal Pages	10
Figure 7:	More JLV Functionality	10
Figure 8:	System Status on the JLV Login Page.....	11
Figure 9:	Context Indicator	12
Figure 10:	Suspending Context.....	13
Figure 11:	CCOW Warning Message	13
Figure 12:	CCOW Error Message.....	14
Figure 13:	Context Synchronization Failure	14
Figure 14:	JLV Settings Dialog Box.....	15
Figure 15:	Blue (Default) UI Theme, DoD Data Disabled	16
Figure 16:	Green UI Theme	16
Figure 17:	Dark Gray UI Theme.....	17
Figure 18:	Gray UI Theme.....	17
Figure 19:	Accessible (508-Compliant) UI Theme.....	18
Figure 20:	Navigation Using Elements with Keyboard Focus.....	20
Figure 21:	Document Details with Keyboard Focus.....	20
Figure 22:	VA User Restricted Access Dialog	21
Figure 23:	VBA User Audit Notification.....	22
Figure 24:	Restricted Access Notification	22
Figure 25:	DoD Sensitive Record and Audit Dialog Box.....	23

Figure 26: DoD ID (EDIPI) Search	25
Figure 27: SSN Search.....	26
Figure 28: Additional Identifiers Needed	26
Figure 29: Advanced Search Options	27
Figure 30: Sponsor SSN Search.....	28
Figure 31: Family Members Dialog Box	29
Figure 32: Recently Viewed Patients List.....	30
Figure 33: Widgets on the Patient Portal	31
Figure 34: Widget Tray.....	31
Figure 35: Date Range Filters Applied	34
Figure 36: Quick Date Range Filter Options	35
Figure 37: Start and End Date Display Filter.....	36
Figure 38: Vitals Widget Text Filter.....	37
Figure 39: Connection Status Indicator	38
Figure 40: Connection Status Details.....	39
Figure 41: Connection Status Window	39
Figure 42: Add Custom Tab Icon	40
Figure 43: Add Tab Dialog Box	40
Figure 44: Camera Icon in the Image Column.....	41
Figure 45: Thumbnail and Link in Details View of the Documents Widget	42
Figure 46: Report Builder Icon	42
Figure 47: Current Report Tab.....	43
Figure 48: Patient Reports Tab	44
Figure 49: Report Builder EZ Select.....	45
Figure 50: Records Added to Report Builder	45
Figure 51: Report Builder Options.....	46
Figure 52: Demographics Widget Add to Report Builder Icon	47
Figure 53 Name Report Dialog Box	48
Figure 54: Patient Reports Tab Report Ready and Delete Option	49
Figure 55: Report Ready Message and Indicator.....	49
Figure 56: Report Contents Window	50
Figure 57: Delete Reports Dialog Box.....	50
Figure 58: Patient Demographics Widget	52
Figure 59: Patient Flags Indicator.....	53
Figure 60: Patient Flags and Postings Details.....	53
Figure 61: Standardized Race Data.....	54
Figure 62: Insurance Information	55
Figure 63: Documents Widget, Minimized View	56
Figure 64: Documents Widget, Expanded View.....	57
Figure 65: Details View of a Document	58
Figure 66: Standardized Name and Code–Documents Widget.....	60
Figure 67: Community Health Summaries and Documents - VA, Minimized View	61
Figure 68: Community Health Document.....	62
Figure 69: MHS GENESIS Widget	63

Figure 70: CCDA Document	64
Figure 71: Login Error - CAPRI Patient Selection Restrictions	65

Table of Tables

Table 1: JLV User Profiles.....	1
Table 2: ESD Contact Information.....	3
Table 3: Accessible Theme Keyboard Shortcuts	19
Table 4: Navigation Icons and Actions.....	32
Table 5: Widget Toolbar Icons	33
Table 6: Error Messages and Resolution Steps.....	66
Table 7: System Error Messages.....	68
Table 8: Community Health Summaries and Documents - VA Widget Error Message.....	69
Table 9: Acronyms and Abbreviations	70
Table 10: Widget Details	72

1. Introduction

Born from a joint Department of Defense (DoD)-Department of Veterans Affairs (VA) venture called JANUS, Joint Legacy Viewer (JLV) was directed by the Secretary of the VA and the Secretary of Defense in early 2013 to further support interoperability between the two departments. JLV is a centrally hosted, Java-based web application managed as a single code baseline and deployed in separate DoD and VA environments. Its browser-based, graphical user interface (GUI) provides an integrated, read-only view of Electronic Health Record (EHR) data from the VA, DoD, and Veterans Health Information Exchange (VHIE) community partners, within a single application.

JLV eliminates the need for VA and DoD clinicians to access disparate viewers. The GUI retrieves clinical data from several native data sources and systems, then presents it to the user via widgets, each corresponding to a clinical data domain.

Users can create and personalize tabs, drag and drop widgets onto tabs, sort data within a widget's columns, set date filters, and expand a widget for a detailed view of patient information. Within each widget, a circular, blue icon indicates the data retrieved is from a VA source; a square, orange icon indicates that the data retrieved is from a DoD source; and a hexagonal, purple icon indicates data that the data retrieved is from VA VHIE partners.

This document is intended for VA JLV users supporting the:

- Veterans Health Administration (VHA)
- Veterans Benefits Administration (VBA)

[Table 1](#) describes authorized JLV users and their responsibilities.

Table 1: JLV User Profiles

User	Description and Responsibilities
DoD Clinician	DoD clinicians who access patient EHRs
VHA	VA clinicians and administrative staff who access patient EHRs to assist in providing health care services
VBA	VA administrative staff who access patient EHRs to assist in VBA processes

1.1. Purpose of the Guide

The purpose of the user guide is to familiarize VA users with the important features and navigational elements of JLV.

The major features of the JLV GUI include:

- Access to patient data (through widgets)
- Patient context management
- User-restricted access (Break the Glass)
- Use of the Report Builder
- Option to use the accessible (508-compliant) interface

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption.

- [Cross References](#) are indicated by blue, underlined text and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is expressed by **bold** and *italicized* text
- The information symbol  calls the reader's attention to additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **Patient Portal:** The page that displays patient data through widgets
- **Provider Portal:** The landing page, or default view, of JLV that appears after logging in to the application that displays widgets and the tools that enable quick access to basic features
- **Tab:** A component of the JLV interface that displays the Patient and Provider portals and presents user-customized views of widgets
- **Widget:** A component of the JLV interface that enables a user to view information or perform a function
- **Widget Tray:** An expandable and collapsible tray at the bottom of the portal pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

The user guide is written from the perspective of VA users, assuming the following:

- You can open, navigate, and use a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have the Uniform Resource Locator (URL) for the JLV **Login** page, a system username, and the required Access and Verify codes
- You are using the functionality of JLV to support VHA and/or VBA workflows

1.3. System Requirements

JLV is optimized for use with the VA standard browser, Internet Explorer (IE) version 11. It is recommended that JLV is viewed using:

- A monitor set to a minimum screen resolution of 1024 x 768
- The approved browser, with the browser's zoom percentage set to 100%

JLV must be accessed through IE. Other web browsers may function but are not certified for support. It is also recommended that Adobe Reader be installed on the user's system.

1.4. Getting Help

Please see online help for how-to information within JLV. Please visit [JLV Resources](#) for access to JLV training videos and additional JLV training materials.

Prior to contacting the Enterprise Service Desk (ESD) for support ([Table 2](#)), please refer to [Logging in to JLV](#) for detailed information about how to access JLV and to [Troubleshooting](#) for suggested resolution steps and troubleshooting information.

If you are an authorized user having trouble logging in to JLV or experiencing other application issues, please contact the ESD via telephone or by using the YourIT self-service portal for assistance.

 **NOTE:** Unregistered users should contact the ESD to request access to JLV.

redacted

2. Logging in to JLV

Authorized, registered users within the VA and DoD are provided access information to log in to JLV. VHA users who have access to the Computerized Patient Record System (CPRS) are automatically authorized to use JLV. VBA users must contact the ESD for access.

Refer to [Troubleshooting](#) for more tips on logging in to JLV.

- i** **NOTE:** Users who are not authorized to access JLV see an “*Access denied*” message. If you believe you received the message in error, please contact the ESD.

The JLV **Login** page displays the last successful and unsuccessful log in attempts in the lower left corner, along with the date, local time, and the Internet Protocol (IP) address from which access was made or attempted access failed.

- i** **NOTE:** There is no functionality available to change a user identification (ID) and password in JLV. See [Troubleshooting](#) for information about login errors, Access code errors, or Verify code errors.

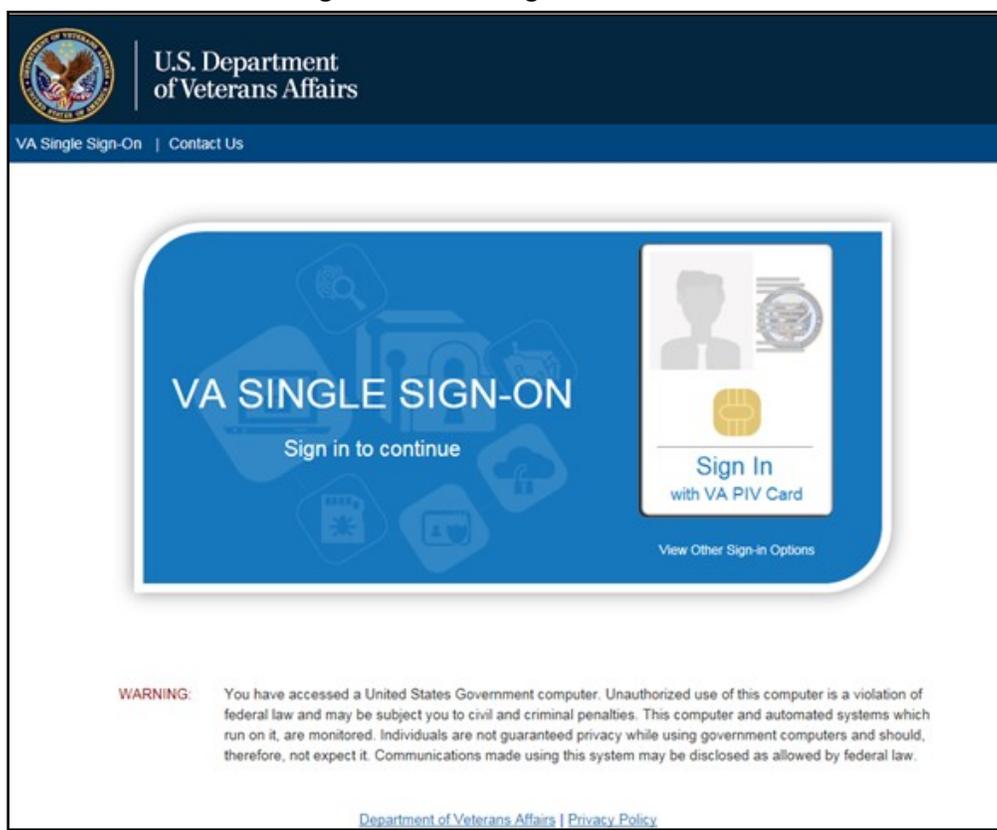
2.1. VHA User Login

These login steps apply to VHA users accessing JLV through a URL.

1. Enter VHA’s URL for JLV into the address bar of your Internet browser
(redacted)
2. All VA users are redirected to the **VA Single Sign-On (SSOi)** page ([Figure 1](#))
 - a. VA users must sign in to, and be authenticated by, SSOi to access JLV

- i** **NOTE:** Users with a Personal Identity Verification (PIV) exemption may select any of the alternate authentication options available through the **VA SSOi Login** page for access to JLV. PIV exemptions, if required, can be obtained from the ESD.

Figure 1: SSOi Page for VA Users



3. Once authenticated by the SSOi system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system, and click **I Accept**
5. If you have adaptive technology installed, you can check the **Accessibility Mode** option in the top-right corner, above the JLV **Login** page fields
 - a. If selected, JLV opens and displays the application in the 508-compliant Accessible User Interface (UI) theme (See [Using the Accessible Theme's Functionality](#) for detailed information)
6. Enter your VA login credentials:
 - a. Enter your CPRS Veterans Health Information Systems and Technology Architecture (VistA) Access Code
 - b. Enter your CPRS (VistA) Verify Code
 - c. Select “VA” from the **Agency** field
 - d. Select your VA Medical Center or regional Health Care System from the Site field
7. Click **Login**

2.2. VBA User Login

The following instructions apply to VBA users accessing JLV.

1. Enter the VBA's URL for JLV into the address bar of your Internet browser (redacted)
2. All VA users are redirected to the **VA SSOi** page ([Figure 1](#))
 - a. VA users must sign in to, and be authenticated by, the SSOi system to access JLV
3. Once authenticated by the SSOi system, you are redirected to JLV
4. Read the important user consent information regarding access to a Government information system, and click **I Accept**
5. If desired, check the **Accessibility Mode** option in the top-right corner, above the JLV **Login** page fields
 - a. If selected, JLV opens and displays the application in the 508-compliant Accessible UI theme (See [Using the Accessible Theme's Functionality](#) for detailed information)
6. Enter your login credentials:
 - a. Enter your Compensation and Pension Record Interchange (CAPRI) Access Code
 - b. Enter your CAPRI Verify Code
 - c. Select "VA" from the **Agency** field
 - d. Select Veterans Benefits Admin from the **Site** dropdown list
7. Click **Login**

i **NOTE:** Users with any CAPRI patient selection restrictions are unable to log in JLV.

2.3. Editing Your User Profile at Login

One method of setting application configuration options (customizing) is by using the **Edit Profile** link ([Figure 2](#)) to access the user profile fields through the JLV **Login** page ([Figure 3](#)).

The subsections below discuss the options to set the data source and UI theme via the **Edit Profile** link.

User profile options can also be set within JLV. See [Customizing JLV](#).

i **NOTE:** The selected options are saved to the user profile by clicking **Save and Login** and remain set for all subsequent JLV sessions until changed by the user.

Figure 2: Edit Profile Link on the JLV Login Page

The screenshot shows the JLV Login Page with the following elements:

- Logo: **Joint Legacy Viewer** powered by *Janus*
- Accessibility Mode:
- Vista Access Code:
- Vista Verify Code:
- Agency:
- Site:
- Edit Profile** (highlighted in yellow)
- Login:
- Announcements: System going down for ALL 2 [More](#)
- System Status: JLV data sources available.
- [JLV Help](#)

Figure 3: User Profile Data Source and User Interface Option Fields

The screenshot shows the User Profile Data Source and User Interface Option Fields with the following elements:

- Accessibility Mode:
- Vista Access Code:
- Vista Verify Code:
- Agency:
- Site:
- Data Source(s): One primary source is required.
 - VA - Veteran Affairs
 - DoD - Department of Defense
- User Interface Theme:
 - Blue (Default)
 - Green
 - Dark Gray
 - Gray
 - Accessible
-
- [JLV Help](#)

2.3.1. Selecting a Data Source

Selecting a data source allows the user to configure whether they see VA data, DoD data, or both. One primary data source is required. The **Data Source** choices appear below the **Agency** and **Site** fields, as seen in [Figure 3](#).

2.3.2. Selecting a UI Theme

Selecting a UI theme sets the font color and foreground/background colors of the JLV GUI for the widgets, toolbars, and dialog boxes. Theme color options are Blue (Default), Green, Dark Gray, Gray, and Accessible (508-compliant). The UI theme choices appear below **Data Source** choices, as seen in [Figure 3](#).

i **NOTE:** The **Accessible** theme provides larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility, compliant with Federal accessibility requirements and Section 508 standards. Refer to [Using the Accessible Theme's Functionality](#) for more information.

2.4. Logging Out of the Current JLV Session

Click the **Log Out** icon  (highlighted in [Figure 4](#)) at any time to end the current session and exit JLV.

Figure 4: JLV Log Out Icon



A JLV session ends automatically after 30 minutes of inactivity. You receive a warning that the current session is about to terminate after 25 minutes of inactivity. Automatic termination of a session logs you out of the application and displays the **Logout** page. Close and reopen the browser and return to the JLV **Login** page to initiate a new JLV session.

Actions in JLV that are considered activity are changing patients, refreshing widgets, opening or closing widgets, adding or removing widgets from the portal pages, and adjusting date ranges.

3. The Elements and Functionality of JLV

3.1. The JLV Portal Pages

After a successful log in, your username is shown in the upper right corner of the application, and the JLV portal pages are displayed. The JLV portal pages are:

- The **Patient Portal** 
- The **Provider Portal** 

3.1.1. Default View

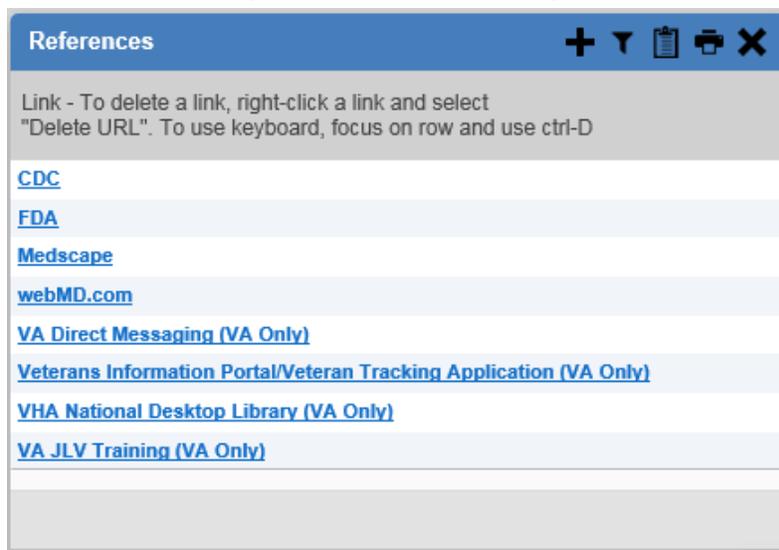
Upon log in, users see the **Provider Portal** . The portal displays the **Patient Search** dialog box and the **References** widget by default.

 **NOTE:** CPRS users who select a patient within CPRS, then launch JLV are taken directly to the JLV **Patient Portal** , where the records for the patient selected in CPRS are displayed.

The **References** widget ([Figure 5](#)) is shown by default on the **Provider Portal** . The **References** widget displays hyperlinked references to online resources. Click a reference link to access the associated website. Click the **Add** icon + to add a new reference link.

Only the reference links you add can be deleted. Right-click the link and select **Delete URL** to delete a reference link. Users are not able to delete reference links included in the default widget configuration.

Figure 5: References Widget



The **Patient Portal** displays a selected patient's clinical records and other patient-centric information.

New JLV users see a preconfigured, default widget layout on the **Patient Portal**  when a patient is selected. The default layout includes the **Allergies**, **Problem List**, **Documents**, **Outpatient Medications**, and **Lab Results** widgets, as well as the **Patient Flags and Postings** widget, if applicable.

 **NOTE:** Users can configure the layout of widgets on the **Patient Portal** and create multiple widget tabs, as described in [Customizing JLV](#) and in [Accessing and Opening Widgets](#). Customizations are saved to the user profile and remain until manually changed.

3.1.2. System Menu

Each portal page has a toolbar in the top-right corner of either portal page (highlighted in [Figure 6](#)) that enables quick access to the following features:

- **Configuration Options:** Click the **Settings** icon  to set user preferences, including the UI theme (Refer to [Customizing JLV](#))
- **Report Builder:** Click the **Report Builder** icon  to create custom reports (Refer to [Using Report Builder](#))
- **Access Online Help:** Click the **Help** icon  to open online help
- **Log Out of JLV:** Click the **Log Out** icon  to log out and close the current JLV session (Refer to [Logging Out of the Current JLV Session](#))

Figure 6: JLV Tools on the Portal Pages



The following functions can be completed from the portal pages (highlighted in [Figure 7](#)):

- Perform a Patient Search 
- Switch between the **Patient Portal**  and the **Provider Portal** 
- View the system status 
- View Context Management status 
- Open the widget tray **Open Widget Tray**  (lower right corner of the portal pages)

Figure 7: More JLV Functionality



3.1.3. Viewing System Status

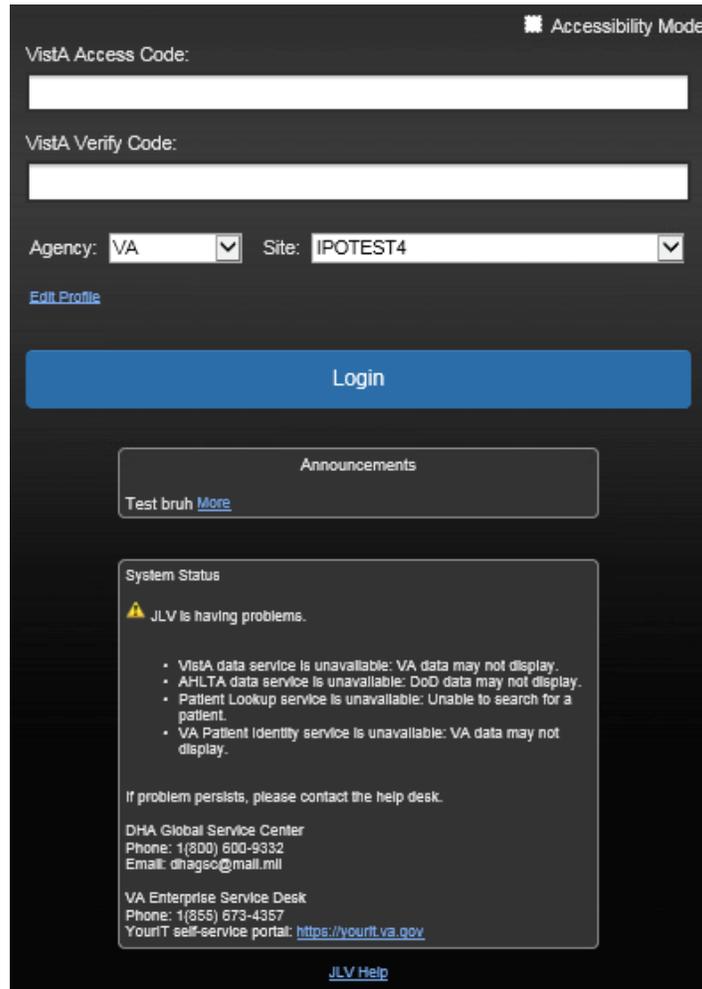
The system status reports the condition of the JLV application. If there is a system status alert, the warning icon  is displayed to the left of your username. Hovering over **System Status** provides additional information.

- **NOTE:** The System Status reports the overall condition of the JLV application, while the Connection Status reports the condition of the connection between JLV and its external resources. See [Viewing Connection Status](#) for more information.

JLV displays the system status on the **Login** page, below the user credential fields (highlighted in [Figure 8](#)), and at the top of the portal pages.

- When all monitored systems and services are online and connected, a green icon  appears next to the status message, “*JLV data sources are available,*” on the JLV **Login** page
- When one or more of the monitored systems or services is offline or unavailable, a yellow warning icon  appears next to the status message, “*JLV is having problems*”
 - Notification of unavailable systems persisting longer than 10 minutes should be reported to the VA Enterprise Service Desk ([Getting Help](#))
- When JLV is unavailable, a red icon  appears next to the message, “*System status is unavailable*”
 - Users may not be able to log in to JLV or view patient data until the connection is restored

Figure 8: System Status on the JLV Login Page



The screenshot shows the JLV Login Page with the following elements:

- Accessibility Mode icon in the top right corner.
- VistA Access Code: [input field]
- VistA Verify Code: [input field]
- Agency: VA [dropdown menu] Site: IPOTEST4 [dropdown menu]
- [Edit Profile](#) link
- Login button
- Announcements section with text: "Test bruh [More](#)"
- System Status section with a yellow warning icon and the message: "JLV is having problems."
- System Status details:
 - VistA data service is unavailable: VA data may not display.
 - AHLTA data service is unavailable: DoD data may not display.
 - Patient Lookup service is unavailable: Unable to search for a patient.
 - VA Patient Identity service is unavailable: VA data may not display.
- Text: "If problem persists, please contact the help desk."
- Contact information:
 - DHA Global Service Center
Phone: 1(800) 600-9332
Email: dhagsc@mail.mil
 - VA Enterprise Service Desk
Phone: 1(855) 673-4357
YourIT self-service portal: <https://yourit.va.gov>
- [JLV Help](#) link at the bottom.

3.1.4. Patient Context Management

Clinical Context Management (CCOW) is a way for applications to synchronize the display of clinical context, based on the Health Level 7 (HL7) CCOW standard. If CCOW-compliant applications are sharing context and one of the applications changes the data display to a different patient, the other applications switch to display that same patient.

JLV is context management-enabled. When context is enabled, a patient change made in one context-enabled application (i.e., CPRS) triggers the same change in JLV. The same effect is shown vice versa; that is, when a patient is selected in JLV, it triggers a patient change in other context-enabled applications.

Context management is enabled by default, and JLV attempts to connect to the context vault upon a valid login. The context status appears in the top-right corner of the portal pages. When context is established, the **Context On** icon  is shown. When context is suspended, the **Context Suspended** icon  is shown.

[Figure 9](#) shows the context indicator location on a JLV portal page. Context is suspended in this example.

Figure 9: Context Indicator



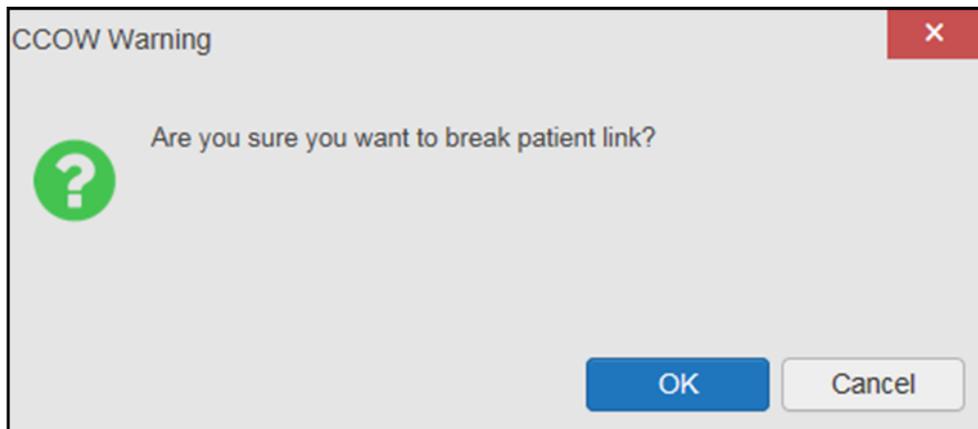
3.1.4.1. Suspending Context

Context can be manually suspended.

1. Click the **Context On** icon .
2. The CCOW warning message, “Are you sure you want to break patient link?” appears ([Figure 10](#))
3. Click **Yes** to continue

Once context is suspended, the **Context Suspended** icon  is displayed on the portal pages. When context is suspended, patient changes are not reflected in either JLV or other CCOW-enabled applications.

Figure 10: Suspending Context



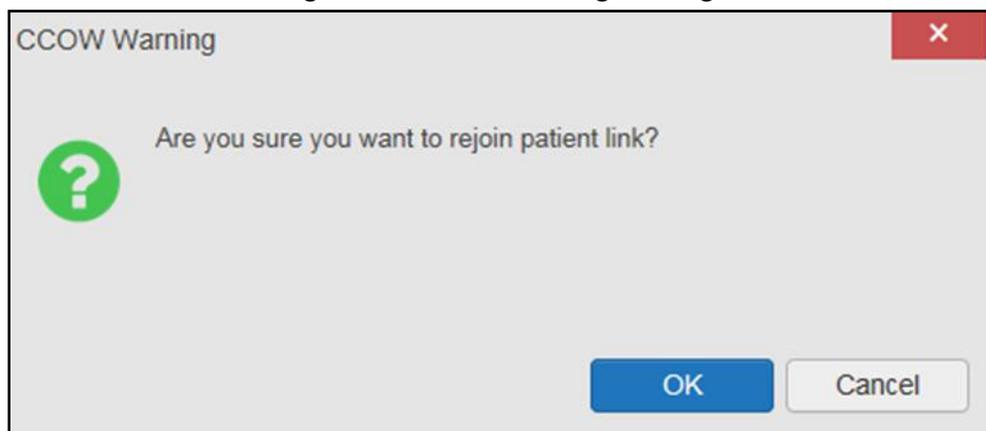
3.1.4.2. Establishing Context

When context is suspended, it can be reestablished manually.

1. Click the **Context Suspended** icon 
2. The CCOW warning message, “*Are you sure you want to rejoin patient link?*” appears ([Figure 11](#))
3. Click **Yes**

Once context is established, the **Context On** icon  is displayed on the portal pages.

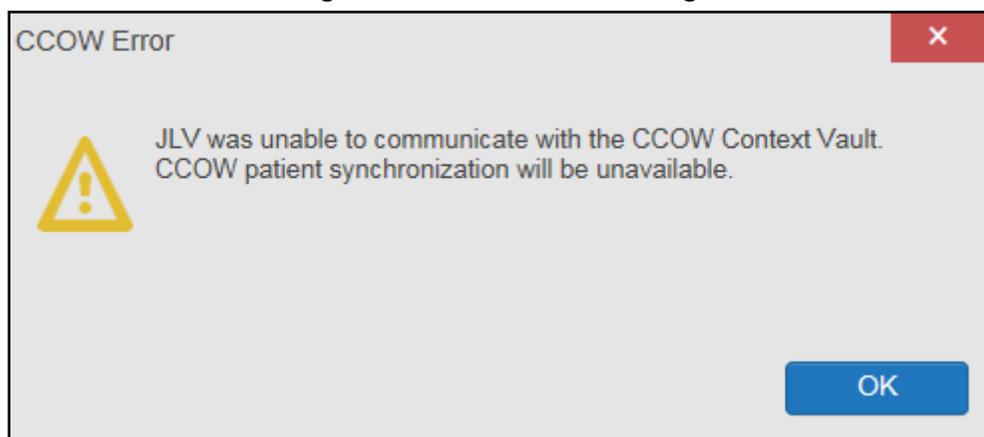
Figure 11: CCOW Warning Message



3.1.4.3. Unable to Communicate with Vault

If JLV is unable to initiate context management upon log in, the user sees the CCOW Error message ([Figure 12](#)). Click **OK** to continue. The **Context Suspended** icon  is displayed on the portal pages. If the CCOW error persists, contact your local service desk for assistance.

Figure 12: CCOW Error Message



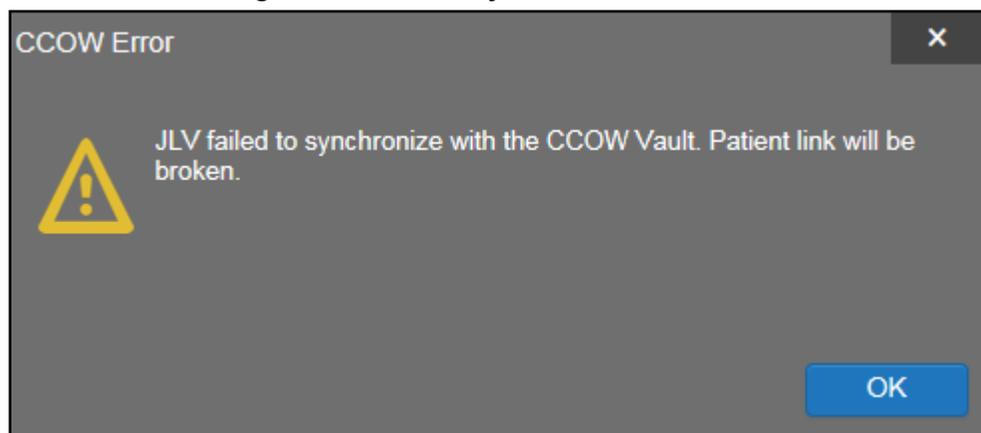
- i** **NOTE:** This error message will automatically display if you have more than one active JLV session open.

3.1.4.4. Context Synchronization Failure

A CCOW Error message is presented if JLV is unable to reestablish context ([Figure 13](#)). This indicates context is suspended. Click **OK** to continue. The **Context Suspended**  icon is displayed on the portal pages.

VBA users encounter the error message ([Figure 13](#)) at each log in, as there are no CCOW system components installed on their computers.

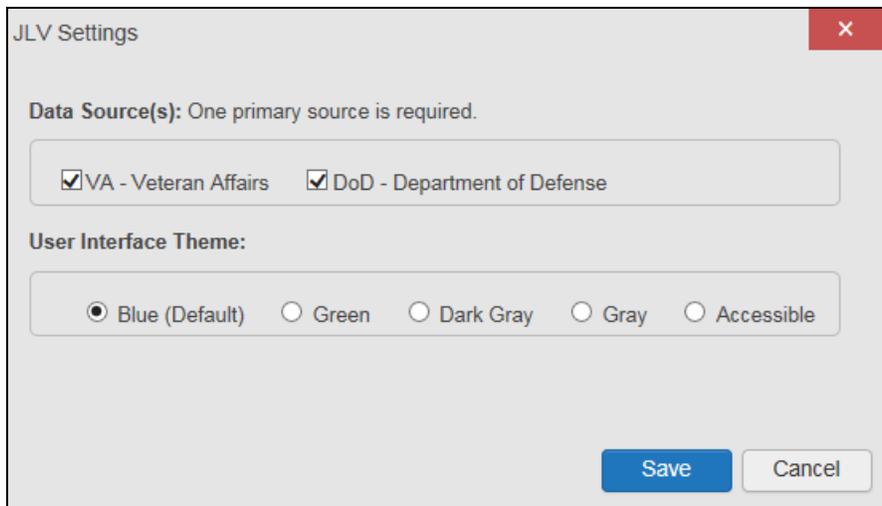
Figure 13: Context Synchronization Failure



3.2. Customizing JLV

Configuration options ([Figure 14](#)) can be set within JLV by clicking the **Settings**  icon.

Figure 14: JLV Settings Dialog Box



 **NOTE:** Changing the data sources or UI theme will require you to reselect and reload the current patient.

3.2.1. Setting the Data Source

The data source setting is part of the user profile. Choosing a data source allows the user to configure whether they see VA data, DoD data, or both. A circular, blue icon in the **Data Sources** pane indicates that VA data is enabled; a square, orange icon indicates that DoD data is enabled; and a circular, gray icon indicates either VA or DoD data is disabled ([Figure 15](#)). One primary data source is required. Once selected, the data source selection is stored in the user profile and remains set until changed.

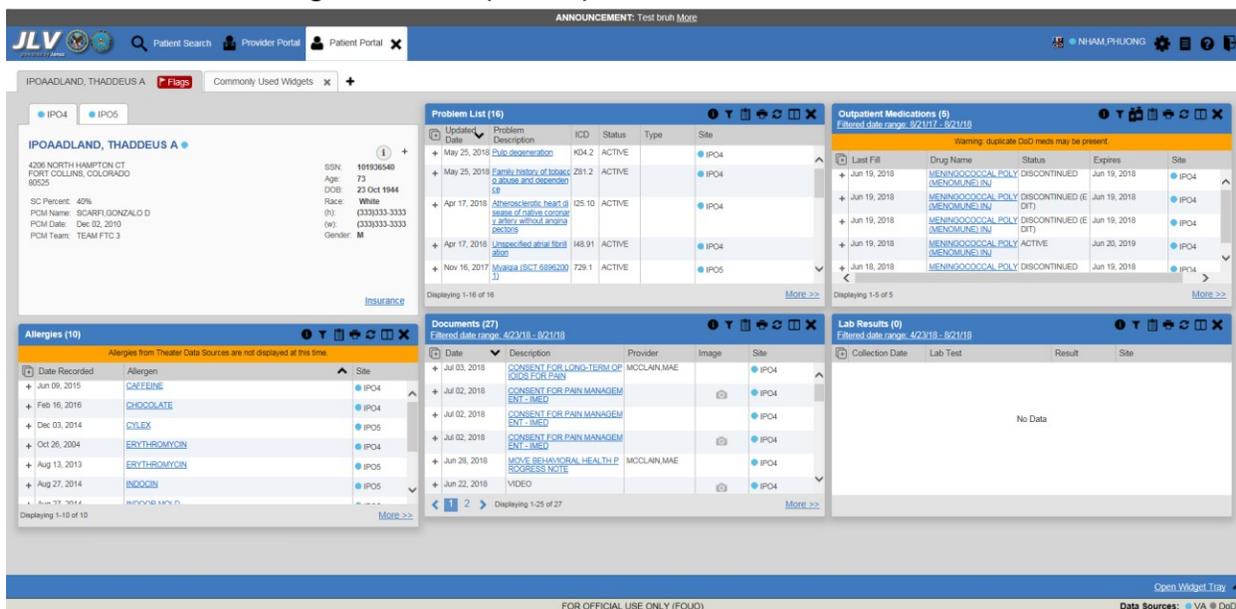
1. Click the **Settings**  icon in the upper right corner of the portal page ([Figure 6](#)) or the **Data Sources** link at the lower right corner of the portal page (see the figures in [Setting the UI Theme](#))
2. The **JLV Settings** dialog box opens ([Figure 14](#))
3. Select the desired data source and click **Save**
4. Alternatively, click **Cancel** to exit the dialog box and restore the previous data source configuration

3.2.2. Setting the UI Theme

The UI theme setting is a part of the user profile. Choosing a UI theme sets the font, foreground, and background colors of the widgets, toolbars, and dialog boxes. Once selected, the UI theme is stored in the user profile and remains set until changed. The available UI themes are Blue (Default), Green, Dark Gray, Gray, and Accessible (508-compliant).

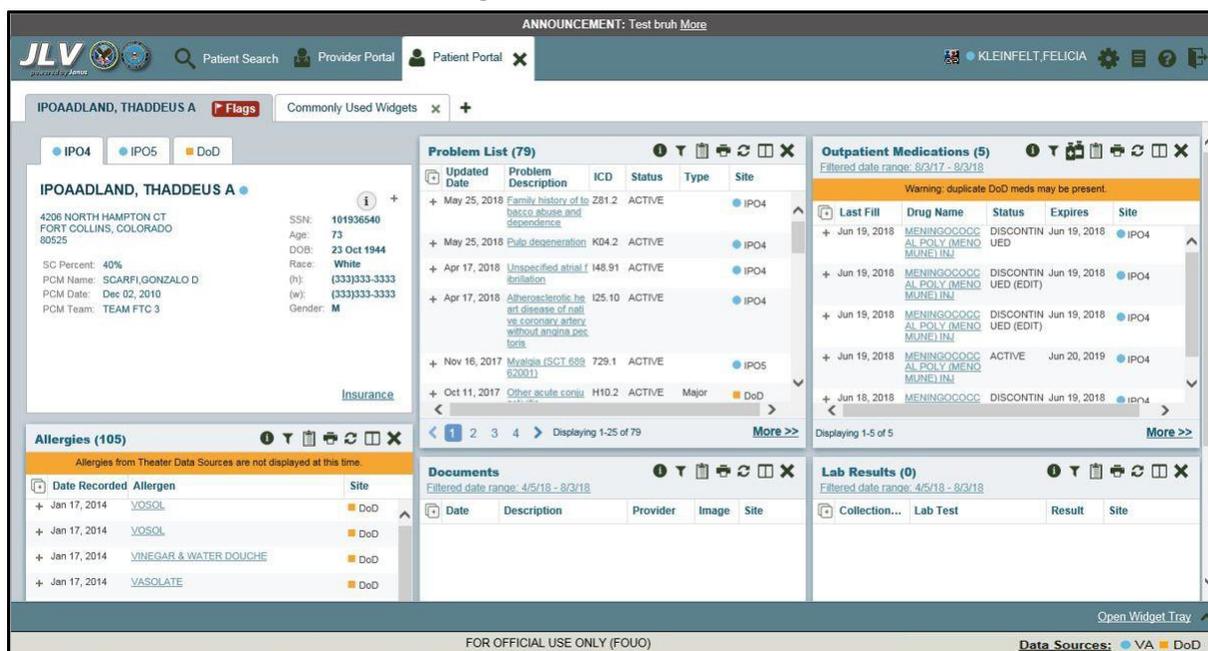
1. Click the **Settings**  icon in the upper right corner of the portal pages ([Figure 6](#))
2. The **JLV Settings** dialog box opens ([Figure 14](#))
3. Select the desired theme and click **Save**
4. Alternatively, click **Cancel** to exit the dialog box and restore the previous theme

Figure 15: Blue (Default) UI Theme, DoD Data Disabled



FOR OFFICIAL USE ONLY (FOUO) Data Sources: VA @ DoD

Figure 16: Green UI Theme

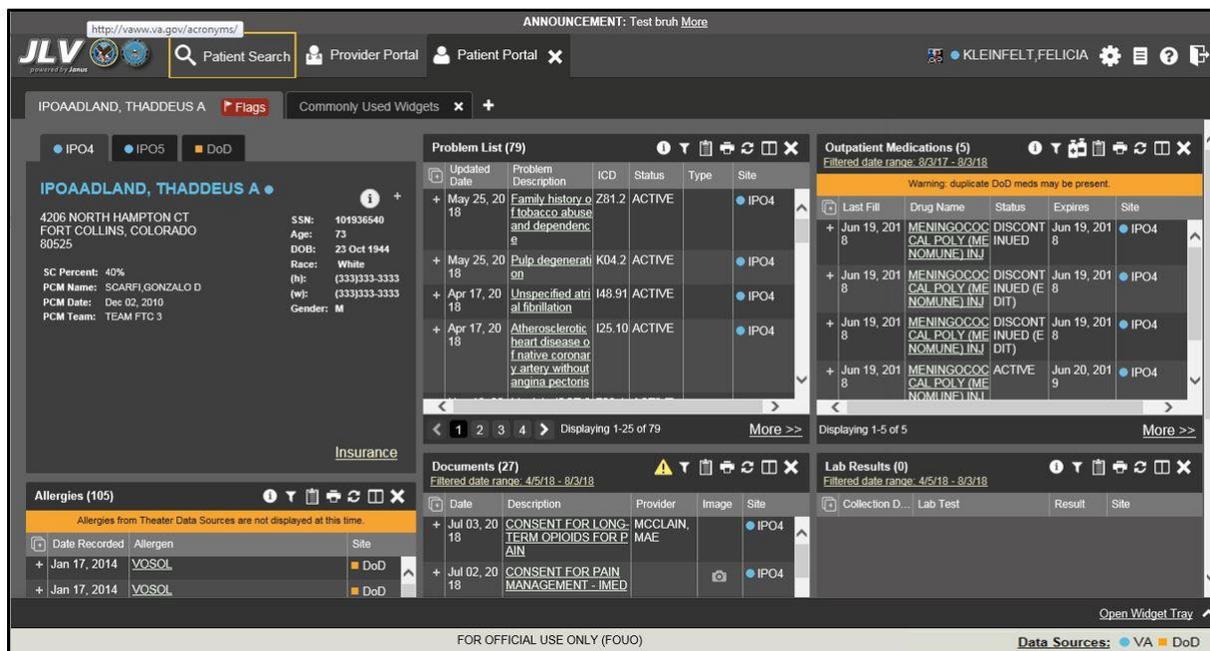


FOR OFFICIAL USE ONLY (FOUO) Data Sources: VA @ DoD

Figure 17: Dark Gray UI Theme

Figure 18: Gray UI Theme

Figure 19: Accessible (508-Compliant) UI Theme



3.2.3. Using the Accessible Theme’s Functionality

The Accessible theme includes larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility to support Federal accessibility requirements and Section 508 compliance.

i **NOTE:** The Accessible theme is available for users who have adaptive technologies installed on their computers.

3.2.3.1. Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of a screen element, field, or control that enables interaction with, and navigation of, JLV using the keyboard and keystrokes. The item in focus is outlined in gold as a visual indicator of the element, field, or control with keyboard focus that receives information typed on the keyboard.

JLV uses common Windows keystrokes (Tab, Shift + Tab, arrow keys, Enter), and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All user interface items are accessible via the keyboard under the **Accessible** theme.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action; for example, pressing **Enter** or the **Spacebar** when the **Settings**  icon is in focus opens the **JLV Settings** dialog box. Using the arrow keys or the **Tab** key moves between keyboard focus items to navigate through screen elements. [Table 3](#) provides a complete list of accessible keystrokes.

Table 3: Accessible Theme Keyboard Shortcuts

Keystroke	Description
Application & Portal Navigation	
ALT + 4	Press to transfer keyboard focus to the main or top screen element 1) Focus transfers to Patient Search or the patient tab in the Demographics widget on a portal page 2) Focus transfers to the More>> link in a widget 3) Focus transfers to the dialog box's Close button in a dialog box
ENTER	Press to initiate the action associated with the item in focus
TAB	Press to transfer keyboard focus to other user interface items
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus or to exit a window, widget, or tab
SPACEBAR	Press to activate any user interface item (for example, click a button)
Arrow Keys	When focused on a widget, press the arrow keys to change page viewing in a widget's data table When focused on a dropdown list, press the down arrow key to view list contents
Ctrl + d	Place keyboard focus on a reference or row within the References widget on the Provider portal and press Ctrl + d to remove the reference URL Removing a default reference is not allowed
Tab Panels	
Arrow Keys	Use the left and right arrow keys to change tab panels Press the right arrow key until the last tab (labeled with a plus sign) is selected to add a tab panel; a dialog box prompts for the new tab name Focus on the tab panel and press Esc to close a tab
Windows or Dialog Boxes	
TAB	Press to transfer keyboard focus to other user interface items within the window or dialog box
Adding Widgets to a Portal Page	
Number position	Add a widget from the widget tray using keystrokes: 1) Determine in which column (1, 2, or 3) to place the widget 2) Focus on the desired widget icon in the widget tray, and press the Alt key and the 1, 2, or 3 key, depending on the column chosen

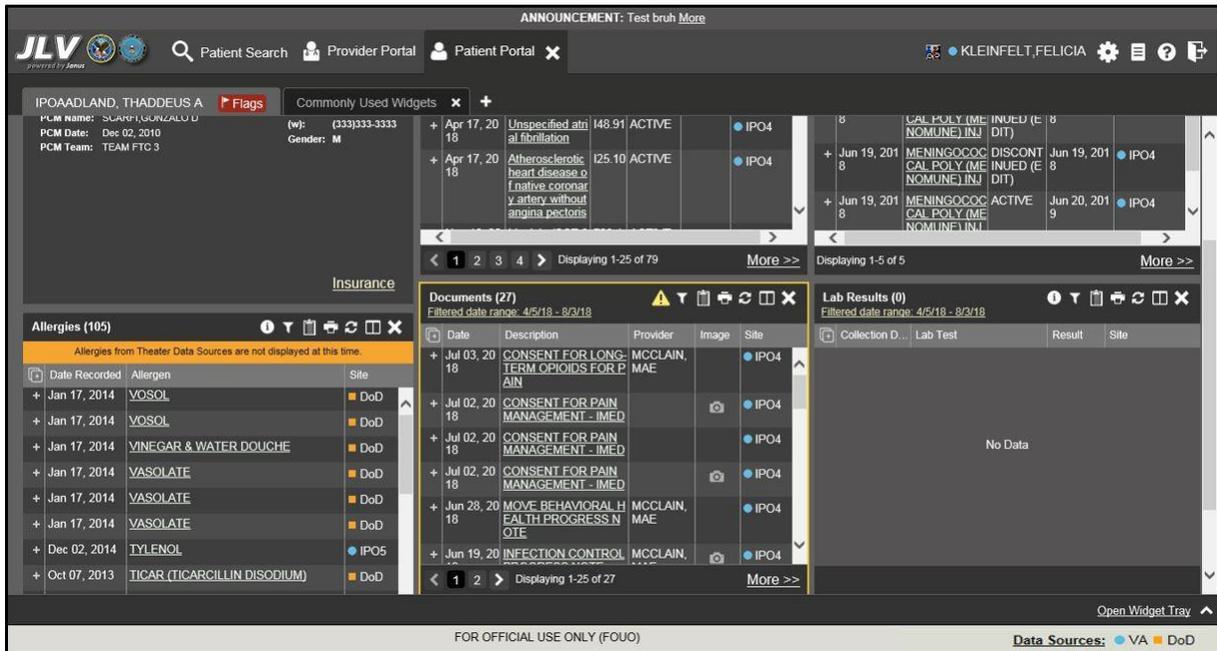
3.2.3.2. Accessible Theme Screen Navigation

An element with keyboard focus is the starting point for screen navigation. Pressing the **Enter** or **Spacebar** keys when a screen element or icon has keyboard focus mimics a mouse click.

[Figure 20](#) depicts the **Documents** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. Pressing the **Tab** key in this example shifts the keyboard focus from the **Documents** widget to the widget immediately below the **Documents** widget. Pressing the **Tab** key again shifts the keyboard focus to the widget at the top of the next column.

 **NOTE:** Focus on the element within the widget that has hover text. After a small delay, the text appears as if the user hovered over the element with a mouse cursor.

Figure 20: Navigation Using Elements with Keyboard Focus



In [Figure 21](#), the **Document** details window has keyboard focus. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to **Close (X)** and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.

Figure 21: Document Details with Keyboard Focus



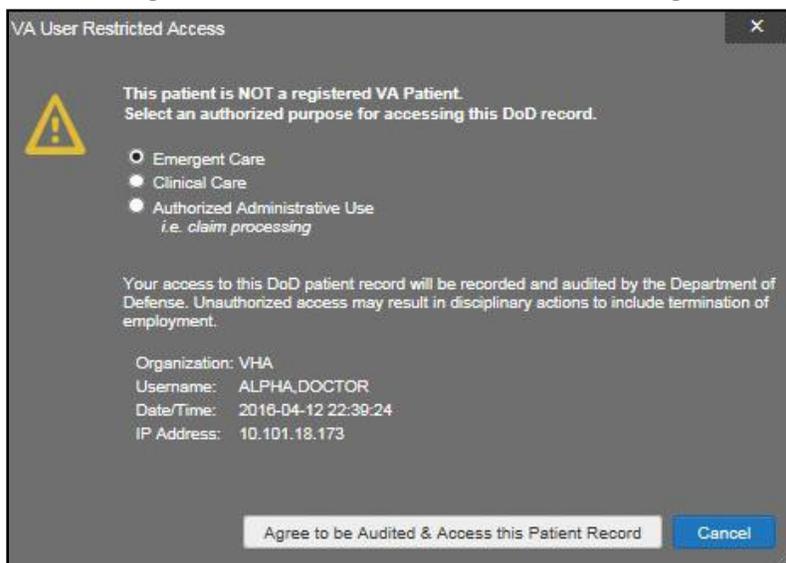
3.3. User-Restricted Access to Patient Data

3.3.1. VHA Users Viewing DoD-only Patients

VHA users are permitted to view the records of patients considered DoD-only, meaning they either have no VA identifiers or are not registered in the Master Veteran Index (MVI). The VA requires that these actions be audited. If an attempt is made to access DoD-only patient records, the VHA user is asked to specify the purpose for access. The purpose options presented to the user are: Emergent Care, Clinical Care, or Authorized Administrative Use ([Figure 22](#)).

Once the purpose for access is selected, clicking **Agree to be Audited & Access this Patient Record** ([Figure 22](#)), displays the requested data, and audits the action. The access purpose, organization of the VA provider, date, username, IP address, user's Internal Entry Number (IEN), host system's ID, and patient's Electronic Data Interchange Personal Identifier (EDIPI) are captured in the audit record.

Figure 22: VA User Restricted Access Dialog

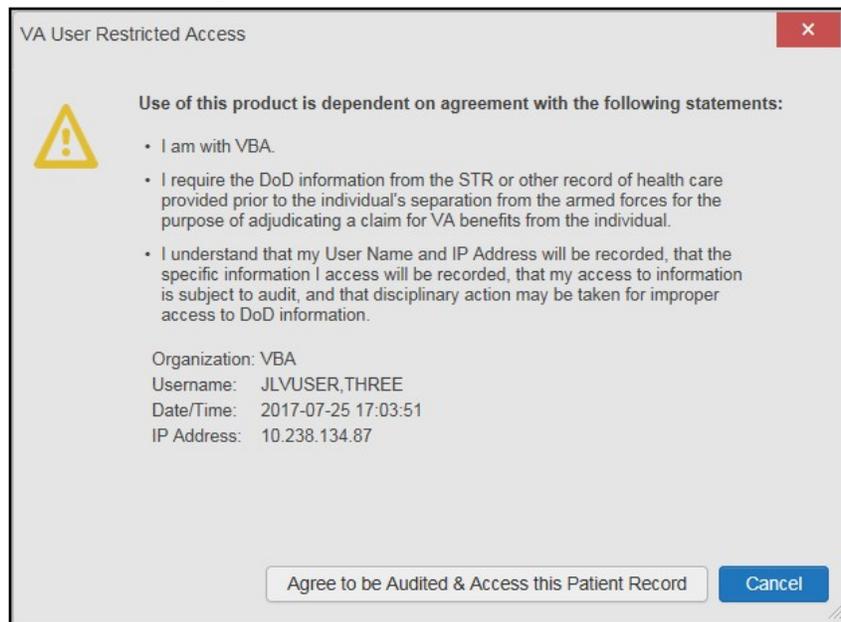


3.3.2. VBA Users Viewing Patients with DoD Data

VBA users may see one of two different dialog boxes, depending on whether the patient is registered for care in the VA. If the patient is registered for care in the VA, they are in MVI.

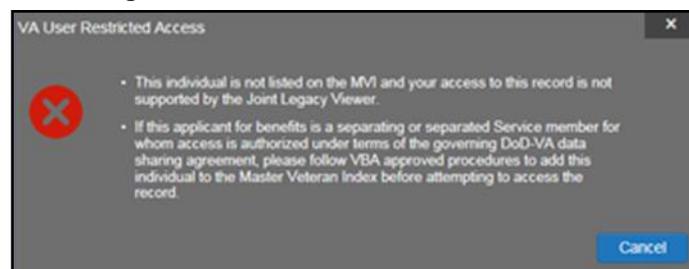
- **Patient registered in MVI:** VBA users are permitted to view the records of a patient who is registered in MVI, but the VA requires that these actions be audited
- After performing a patient search and selecting a patient from the search results, a VBA user sees the audit notification ([Figure 23](#)) if the patient they selected is registered in MVI
 - After agreeing to the audit, the VBA user can access the patient's record

Figure 23: VBA User Audit Notification



- **Patient not registered in MVI:** VBA users are not permitted to access the records of a patient who is not registered in MVI
 - After performing a patient search and selecting a patient from the search results, a VBA user sees the restricted access notification ([Figure 24](#)) if the selected patient is not registered in MVI
 - Clicking **Cancel** returns the user to the previous screen

Figure 24: Restricted Access Notification



3.3.3. Access to DoD Sensitive Records

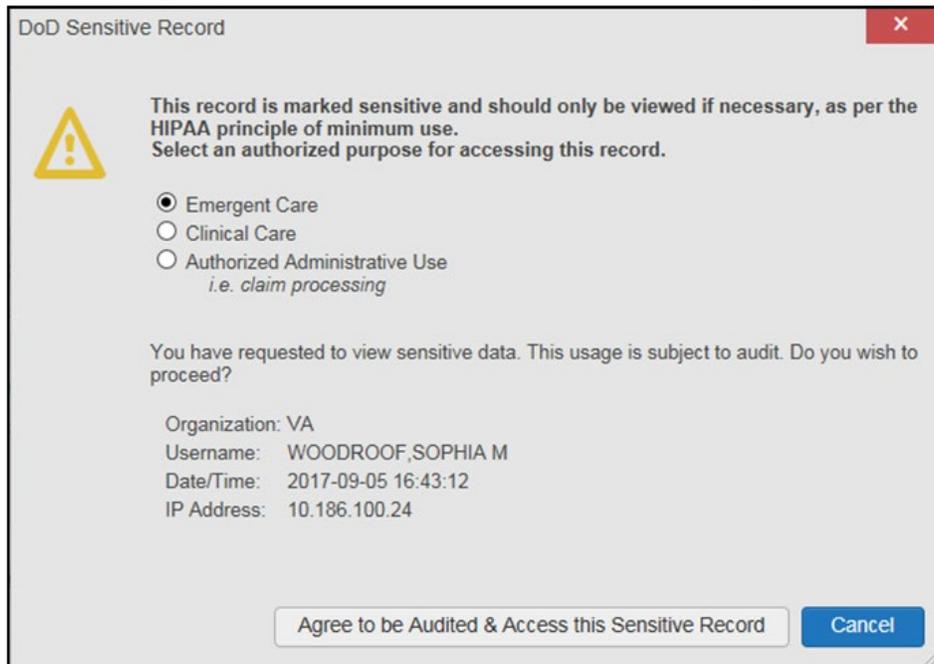
All JLV users are audited each time a sensitive DoD record is accessed. Auditing applies to sensitive documents, lab panel results, outpatient encounters, or progress notes records. JLV records the user's name, organization, Social Security Number (SSN)/EDIPI (for DoD users), PIV (for VA users), location, patient identifiers (patient last name, first name, middle initial [MI], SSN/EDIPI [DoD only], MVI [VA only], and date of birth [DOB]), data accessed, date and time, and reason for access for each attempt to access sensitive data.

- i** **NOTE:** The audit prompt is seen each time access to a sensitive record is attempted, even if the user has been previously audited for the same record.

JLV notifies users before they are audited. The message is triggered when the user clicks a masked record that is marked **** Sensitive****. An example of a masked record displayed in a widget and the audit notification are depicted in [Figure 25](#).

After the user selects the purpose for viewing the record and agrees to be audited, the sensitive data is displayed in the **Details** view of the widget.

Figure 25: DoD Sensitive Record and Audit Dialog Box



3.4. Patient Searches

The core function of JLV is to display patient information on the **Patient Portal** . Use the **Patient Search** feature to perform a patient search, perform a family search, or use the advanced search options.

JLV determines which enterprise service to use for a patient search, based upon the search criteria:

- If the EDIPI or Sponsor SSN is entered, JLV utilizes Patient Discovery Web Service (PDWS) for the search (See [PDWS Search Rules and Supported Searches](#) for details)
- If the EDIPI or Sponsor SSN fields are empty, JLV utilizes MVI for the search (See [MVI Search Guidelines](#) for details)

3.4.1. PDWS Search Rules and Supported Searches

When JLV utilizes PDWS for patient search, the applicable rules and rule sets required for the PDWS interface must be used:

- **Rule Set 1:** When searching by SSN, the full nine-digit SSN must be entered, and the Last Name or DOB must also be supplied
 - This is true for search by patient SSN as well as Sponsor SSN
- **Rule Set 2:** If you do not have the patient's SSN, you must supply ALL the following identifiers: last name, first name, DOB, and gender
 - Blanks in any of these four required fields generates an error
- A 10-digit string is required for telephone number

The following search combinations are supported when PDWS is utilized:

- DoD ID, also referred to as the EDIPI
- Patient SSN and Last Name
- Patient SSN and DOB
- Sponsor SSN and Last Name
- Sponsor SSN and DOB
- Last Name, First Name, DOB, and Gender (ALL identifiers must be entered)

3.4.2. MVI Search Guidelines

JLV utilizes MVI for a patient search when the search parameters include the patient's name and SSN. MVI requires the full last name is entered when the patient's SSN is entered. MVI may also require entering the patient's first name and DOB to increase the efficiency of the search, and the likelihood of locating the patient. An example would be searching for a patient with a common last name, such as Smith or Jones.

3.4.3. Patient Search Using DoD ID

1. Click the **Patient Search** icon  at the top of the portal pages
 - a. The **Patient Search** dialog opens
2. Enter the 10-digit patient DoD ID (EDIPI) in the **DoD ID** field ([Figure 26](#))

Figure 26: DoD ID (EDIPI) Search

Name	SSN	Date of Birth	Gender
IPOAADLAND, THADDEUS A	101936540	19441023	M

3. Click **Search**
 - a. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
4. Click a patient's name in the search results list to open the associated record
 - a. The **Name**, **SSN**, **DOB**, and **Gender** columns in the results list provide information to assist with patient identification
5. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

3.4.4. Patient Search Using SSN

1. Click the **Patient Search** icon  at the top of the portal pages
 - a. The **Patient Search** dialog box opens
2. Enter the patient's full, nine-digit SSN in the **SSN** field ([Figure 27](#))
 - a. When searching by SSN, either the last name or the DOB *must* be entered to perform the search

Figure 27: SSN Search

The screenshot shows a 'Patient Search' window with the following fields and values:

- DoD ID:
- OR
- SSN: OR Sponsor SSN:
- * Last Name: First Name:
- << [Show Advanced Search Options](#)
- * When searching by SSN, Last Name or DOB is required.
-

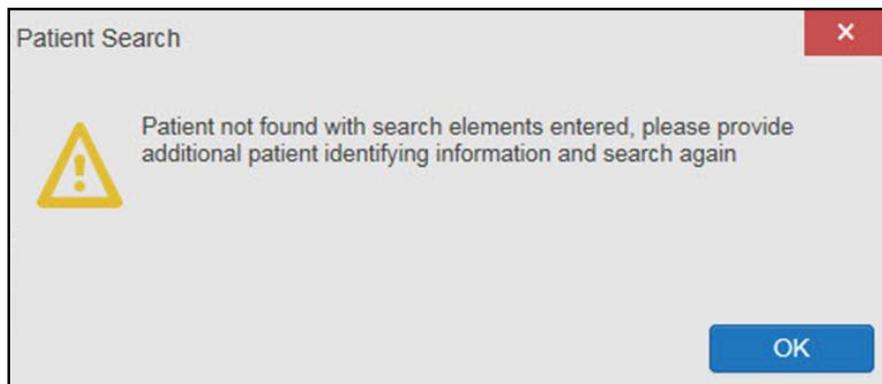
Below the search fields, there are two tabs: 'Recently Viewed Patients' and 'Search Results'. The 'Search Results' tab is active and displays a table with the following data:

Name	SSN	Date of Birth	Gender
IPOAADLAND, THADDEUS A	101936540	19441023	M

3. Click Search

- a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
- b. If a match of patient names cannot be made, enter additional identifiers (first name, DOB) to refine the search ([Figure 28](#))

Figure 28: Additional Identifiers Needed



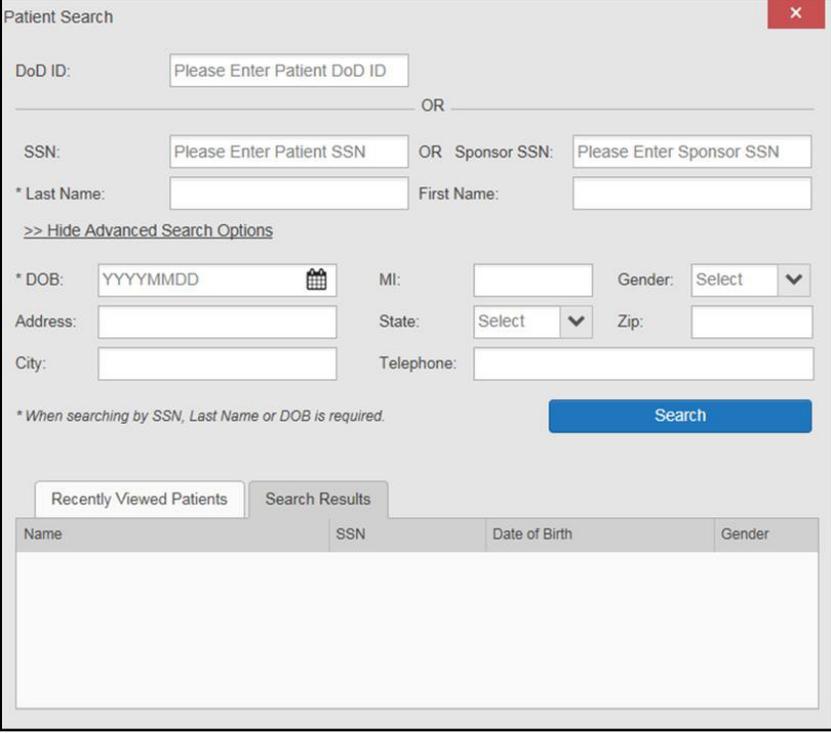
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
5. Click a patient's name in the search results list to open the associated record
 - a. The **Name, SSN, DOB,** and **Gender** columns in the results list provide information to assist with patient identification
6. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

3.4.5. Advanced Patient Search Options

Advanced patient search options in the **Patient Search** dialog box allow for the use of additional patient identifiers when performing a patient search.

1. Click the **Patient Search** icon  at the top of the portal pages
 - a. The **Patient Search** dialog box opens
2. Click the **<<Show Advanced Search Options** link under the ***Last Name** field (seen in [Figure 27](#))
3. Enter the patient identifiers in the appropriate search fields, as desired
 - a. Advanced search option fields include ***DOB, MI, Gender, Address, State, City, Zip,** and **Telephone** (seen in [Figure 29](#))

Figure 29: Advanced Search Options



The screenshot shows a 'Patient Search' dialog box with the following fields and options:

- DoD ID:**
- OR** separator
- SSN:** **OR** **Sponsor SSN:**
- * Last Name:** **First Name:**
- >> Hide Advanced Search Options** link
- * DOB:**  **MI:** **Gender:** 
- Address:** **State:**  **Zip:**
- City:** **Telephone:**
- * When searching by SSN, Last Name or DOB is required.**
- Search** button
- Navigation tabs: **Recently Viewed Patients** and **Search Results** (selected)
- Search Results table with columns: **Name**, **SSN**, **Date of Birth**, and **Gender**

4. Click **Search**
 - a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search

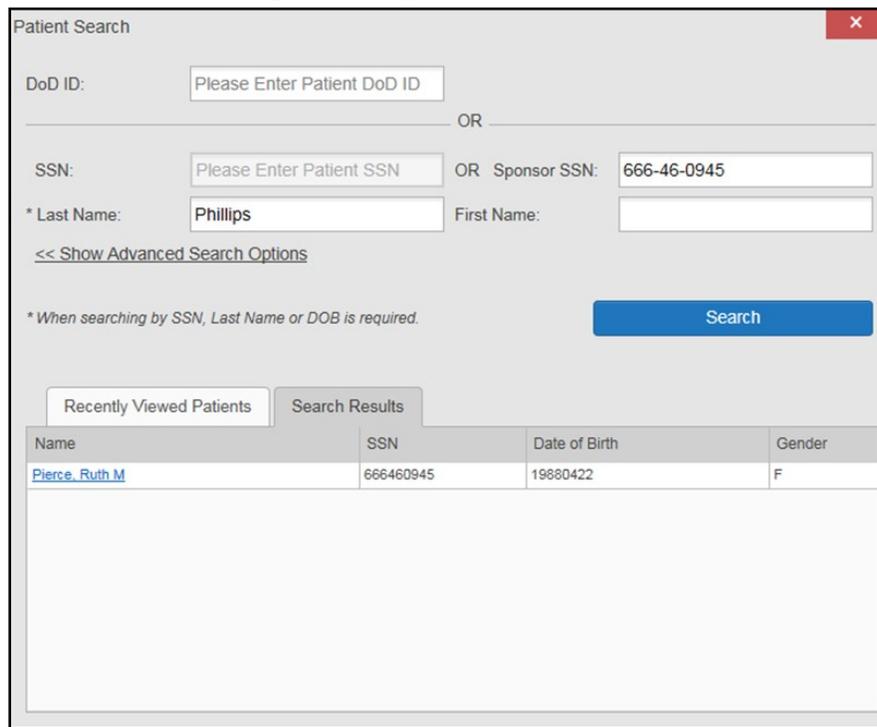
5. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
6. Click a patient's name in the search results list to open the associated record
 - a. The **Name**, **SSN**, **DOB**, and **Gender** columns in the results list provide information to assist with patient identification
7. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

3.4.6. Family Member Search

A family member search can be performed using the **Sponsor SSN** field in the **Patient Search** dialog box.

1. Click the **Patient Search** icon  at the top of the portal pages
 - a. The **Patient Search** dialog box opens
2. Enter the SSN in the **Sponsor SSN** field
 - a. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields ([Figure 30](#))
3. Click **Search**
 - a. If the required patient identifiers are not provided, hover text appears indicating the information necessary to complete the patient search
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab ([Figure 30](#))

Figure 30: Sponsor SSN Search



The screenshot shows a 'Patient Search' dialog box with the following fields and values:

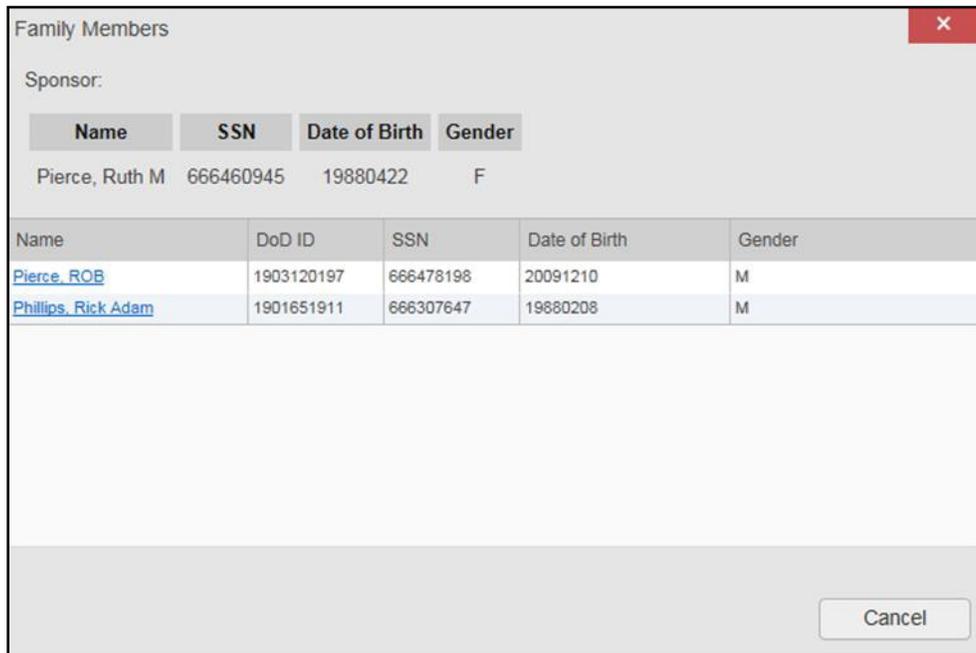
- DoD ID:
- OR
- SSN: OR Sponsor SSN:
- * Last Name: First Name:
- [<< Show Advanced Search Options](#)
- * When searching by SSN, Last Name or DOB is required.
-

Below the search fields, there are two tabs: 'Recently Viewed Patients' and 'Search Results'. The 'Search Results' tab is active, displaying a table with the following data:

Name	SSN	Date of Birth	Gender
Pierce, Ruth M	666460945	19880422	F

5. Click a name in the **Search Results** list
 - a. The **Family Members** dialog opens ([Figure 31](#))
 - b. The sponsor's identifiers and a list of dependents are displayed in the dialog
6. Click a name in the list of family members to open the associated record
7. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

Figure 31: Family Members Dialog Box



Family Members				
Sponsor:				
Name	SSN	Date of Birth	Gender	
Pierce, Ruth M	666460945	19880422	F	
Name	DoD ID	SSN	Date of Birth	Gender
Pierce, ROB	1903120197	666478198	20091210	M
Phillips, Rick Adam	1901651911	666307647	19880208	M

Cancel

3.4.7. Recently Viewed Patients List

Users who have previously logged in to JLV, searched for a patient, and viewed that patient's records, can see and access a list of recently viewed patients. A recent patient is defined as a patient whose record has been viewed (opened) by the user.

 **NOTE:** The **Recently Viewed Patients** list does not include search history or recent search results, only a list of patients whose data was accessed and viewed. The list is limited to 10 patients.

1. Click the **Patient Search** icon  at the top of the portal pages
 - a. The **Patient Search** dialog box opens
2. Click the **Recently Viewed Patients** tab in the lower third of the **Patient Search** dialog box
3. A list of recently viewed patients is displayed ([Figure 32](#))
 - a. The **Name**, **DoD ID**, **SSN**, **DOB**, and **Gender** columns in the results list provide information to assist with patient identification
4. Click a patient's name in the **Recently Viewed Patients** list to open the associated record
5. After selecting a patient, the **Patient Portal**  opens and displays the selected patient's data

Figure 32: Recently Viewed Patients List

Patient Search ✕

DoD ID:

OR

SSN: OR Sponsor SSN:

* Last Name: First Name:

[<< Show Advanced Search Options](#)

** When searching by SSN, Last Name or DOB is required.*

Recently Viewed Patients Search Results

Name	DoD ID	SSN	Date of Birth	Gender
IPOBEHAN, SAUL G	1606682375	101551411	17 Jun 1920	M
IPOABOOD, VANCE EUGENE	1606681182	101942147	03 Nov 1948	M
IPOAADLAND, THADDEUS A	1606681433	101936540	23 Oct 1944	M

4. Widgets

Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages ([Figure 33](#)), but they can be expanded to view additional details. The list of available widgets is provided in a horizontal tray at the bottom of the page.

i **NOTE:** Widgets may take anywhere between 10 seconds to 90 seconds to load, depending on the date range settings.

Figure 33: Widgets on the Patient Portal

The screenshot displays the JLV Patient Portal interface for patient IPOAADLAND, THADDEUS A. The page features several widgets:

- Patient Information:** Displays patient details such as SSN (101936540), Age (73), DOB (23 Oct 1944), Race (White), and PCM Name (SCARFI, GONZALO D).
- Problem List (79):** A table listing medical problems with columns for Updated Date, Problem Description, ICD, Status, Type, and Site. Examples include "Family history of tobacco abuse and dependence" and "Pulso degeneration".
- Outpatient Medications (5):** A table showing medication details like Last Fill, Drug Name (e.g., MENINGOCOCCAL POLY (MENG MUNI) INJ), Status, Expires, and Site.
- Allergies (105):** A table listing allergens such as VOSOL, VINEGAR & WATER DOUCHE, and VASOLATE.
- Documents (27):** A table listing documents with columns for Date, Description, Provider, Image, and Site.
- Lab Results (0):** A table for lab results with columns for Collection Date, Lab Test, Result, and Site.

At the bottom of the page, there is a link for "Open Widget Tray" and a footer indicating "FOR OFFICIAL USE ONLY (FOUO)" and "Data Sources: VA DoD".

4.1. Accessing and Opening Widgets

Widgets can be opened, rearranged, and closed. All available widgets are displayed in the widget tray, at the bottom of the portal pages ([Figure 34](#)).

Figure 34: Widget Tray

The screenshot shows the "Widget Tray" with the heading "Drag and Drop Widgets to Your Portal". It contains a horizontal list of widget icons and labels:

- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Community Health Summaries and Documents - VA
- Consult Encounters
- Documents
- Health Summaries
- Immunizations
- Inpatient Medications
- MHS GENESIS
- Orders
- Outpatient Encounters
- Outpatient Medications

Navigation arrows are visible at the bottom of the tray.

1. Open the widget tray by clicking the **Open Widget Tray** link in the lower right corner of the portal page
2. Use the scroll bar arrows < > at either end of the tray to see all widget choices

-OR-

3. Click the **More Widgets >>** link to scroll through the list of widgets
4. Click and hold a widget in the tray, then drag it to the portal page and drop it in the desired location
5. The widget is docked on the portal page, and opens in minimized view
6. Close the widget tray by clicking the **Close Widget Tray** link

Widgets can be closed (removed from the portal page) by clicking the **Close** icon **✕** in the top-right corner of the widget. Rearrange the widgets displayed on the portal page by dragging and dropping them.

4.2. Widget Navigation and Display Options

Each widget has tools and display options available to navigate through, and change, the display of data. The vertical scroll bar allows the user to move through, and view, the widget's data. The options at the bottom of a widget provide various ways to see all the records loaded for the widget's clinical domain.

Navigation icons and actions are detailed in [Table 4](#).

Table 4: Navigation Icons and Actions

Navigation Icon/Action		Description
	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
	Jump to Page	Changes the focus of the widget to the page number selected.
	Go to Next Page	Changes the focus of the widget to the next group or page of records within the results display.
More >>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.
1-25 of 55	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of results for that widget.
Show All/ Show Paged	Display Setting	Click Show All to open all records for a given widget in a scrollable window. Click Show Paged to return to the display of records grouped by pages.

When there are more than 25 records available in a widget, they are grouped in **Show Paged** view. Records 1 through 25 can be viewed by using the widget's vertical scroll bar. Records 26+ can be viewed by using the page navigation options, in the lower left corner of the widget, to jump to subsequent pages. The expanded view of a widget contains a **Show All** link, which opens all records for that widget, in a scrollable window. Click **Show Paged** to return to the display of records grouped by pages.

4.3. Widget Toolbars

There is a toolbar in the upper right corner of both the minimized and expanded views of each widget, and most dialog boxes. Toolbar icons vary by widget, open dialog box, and window.

[Table 5](#) describes the functionality of each toolbar icon.

Table 5: Widget Toolbar Icons

Icon	Name	Function
	Add to Report Builder	Adds the information displayed in the window to the Report Builder. This icon is available for supported domains when a record has a Details or Notes view that displays in a standalone window.
	Close	Removes the widget from the portal screen or closes a dialog box.
	Column Settings	Used to configure the columns within the widget. Turn on or off the columns displayed by checking the column names that appear in the pop-up box and checking Apply .
	Configure Filter	Used to filter on specific record types or other elements within the widget, including a date filter. If a date range filter is applied in an open widget, the date range is displayed in the widget header. Note: After setting a filter, the Close Filter option is enabled in the widget. Clicking Close Filter restores the full display of records within the widget.
	Copy to Clipboard	Copies the content of the open window to the clipboard for pasting into another application. Copy to Clipboard is disabled in the widget toolbar after clicking Show All within a widget.
	Connection Status	Both icons provide a status indicator for DoD and VA data sources. The circle with the lowercase "i"  indicates all sources are available. The yellow triangle warning  indicates one or more data sources are unavailable. Clicking either status icon opens the connection status details in a separate window.
	Print	Prints the contents of the open window. Printing is disabled in the widget toolbar after clicking Show All within a widget. Note: It is recommended that JLV users have the latest Adobe Reader installed for the Report Builder and other printing features.
	Refresh	Refreshes the widget or window display. Only the data within that widget's dataset is updated.
	Rx	Converts the medication data within the widget to text and opens the text in a pop-up window. Available from the Outpatient Medications widget.
	Site List	Opens a list of community sites where the patient has been seen (only available from the Community Health Summaries and Documents - VA widget).

4.4. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized (default) or an expanded view. Minimized view displays a simple list of the available patient data for a clinical domain, arranged in reverse chronological order by default. Expanded view provides a detailed list of similarly arranged patient data. When the expanded view of a widget is launched, it opens in a new, separate

window that displays more attributes of the records in the widget, including additional, sortable columns of data.

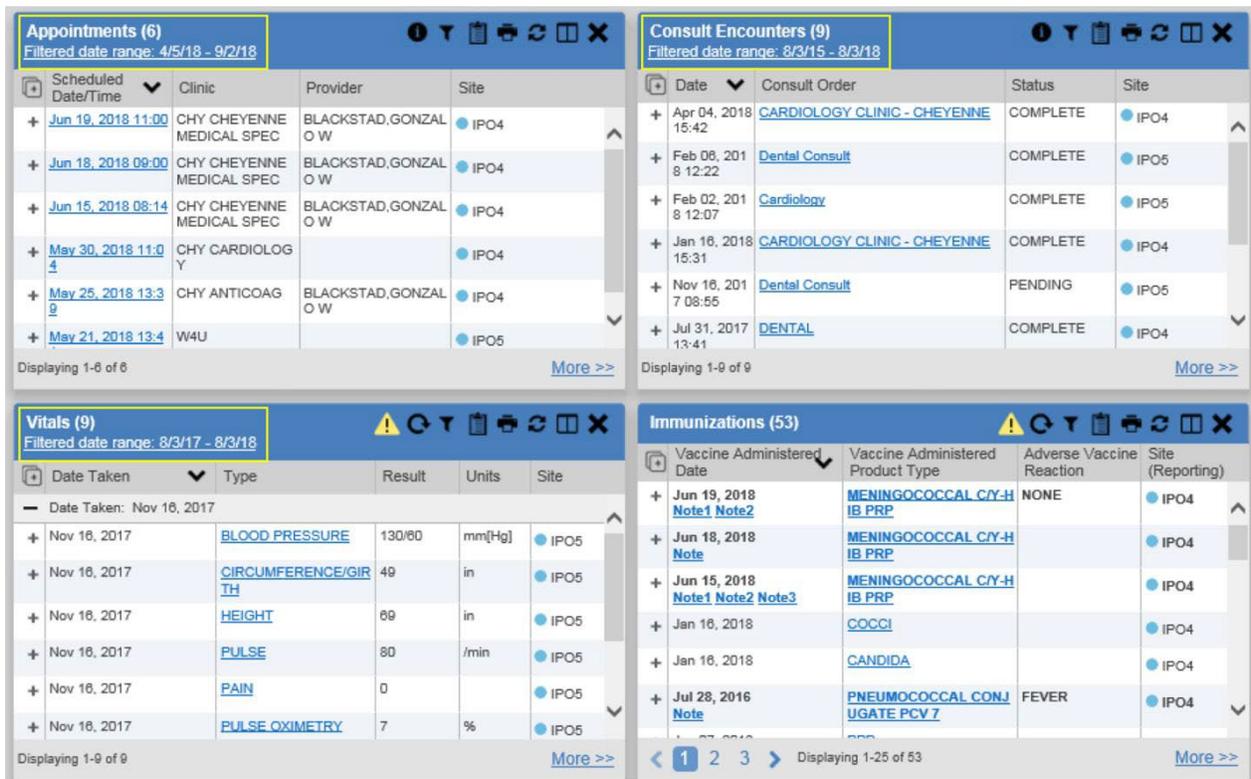
i **NOTE:** The **Community Health Summaries and Documents - VA** widget does not have an expanded view. Instead, a document opened from the minimized view of the widget is displayed in a new, separate window.

Click the **More >>** link at the bottom of a widget to launch the expanded view and see the additional display and functionality options.

4.4.1. Date Range Filters

Patient data displayed within a widget can be filtered by date range. If a date range filter is applied, the selected range is indicated in the widget header, below the title. Click the **Configure Filter** icon  or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed ([Figure 35](#)).

Figure 35: Date Range Filters Applied



There are two ways to filter the date range of data displayed in a widget: the **Quick Date Range** filter and the **Start and End Date** filter. If the expected information does not appear in the widget display, use the date filter options to change the date range.

- i** **NOTE:** Changes made to the date range in a widget persist from minimized to expanded view, patient to patient, and session to session, until the widget is either removed or the date range is changed.

4.4.1.1. Quick Date Range Filter

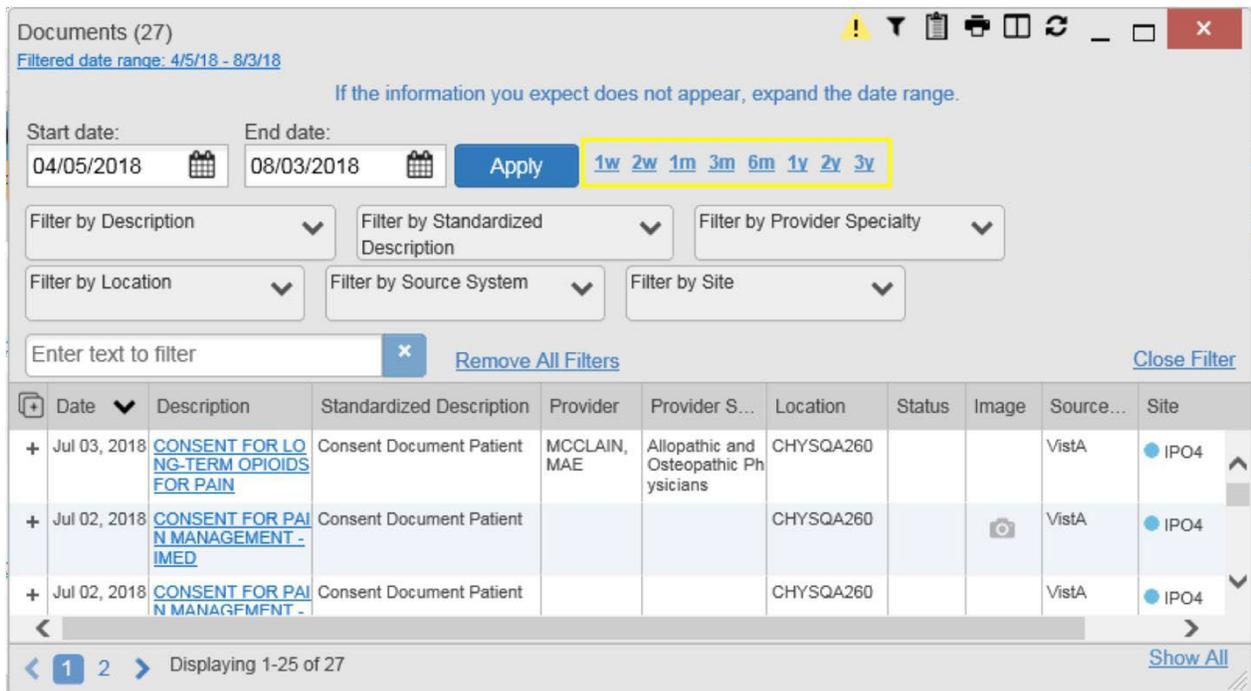
Use the preset, **Quick Date Range** filter to set or limit the display of patient records within a widget. This option is available by clicking the **Filtered Date Range** link, or by clicking the **Configure Filter** icon  in a widget on the **Patient Portal**.

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. The options represent time counting back from the present day (for example, selecting 2y displays only records within the last 2 years). Examples of preset date ranges include 1w (last 7 days), 6m (last 6 months), and 3y (last 3 years).

- i** **NOTE:** The **Quick Date Range** filter is contextual. If today is February 2, 2017, the preset filters counts backwards using that date. If today is April 16, 2017, the preset filter counts backwards using that date.

[Figure 36](#) highlights the **Quick Date Range** filter options in the expanded view of the **Documents** widget.

Figure 36: Quick Date Range Filter Options



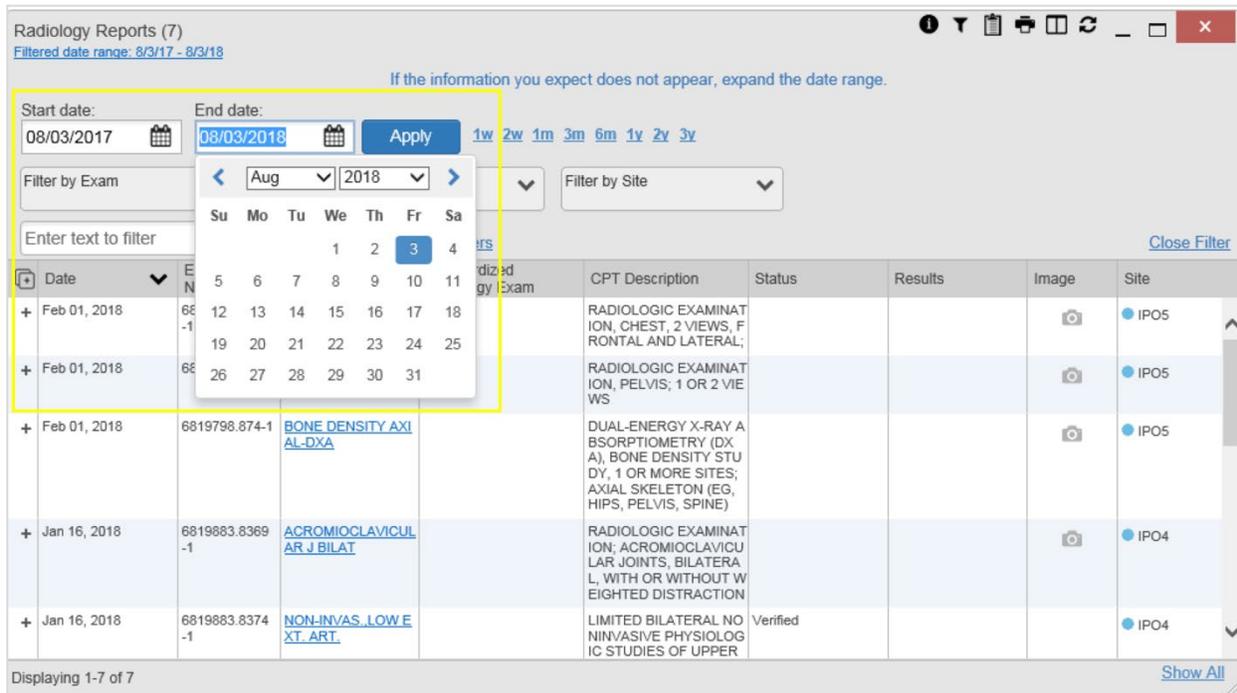
4.4.1.2. Start and End Date Filter

Use the **Start Date and End Date** filter to display data for a specific time range. The start and end date fields are available at the top of multiple widgets by clicking the **Filtered Date Range** link or the **Configure Filter** icon .

i **NOTE:** The **Start and End Date** filter is static. If the start date is set to June 2, 2016 and the end date is set to June 2, 2017, the data in that date range displays, no matter what today's date is.

[Figure 37](#) provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

Figure 37: Start and End Date Display Filter



1. Click the **Calendar** icon next to **Start Date**
2. Select a month, day, and year start date for the display filter

i **NOTE:** The custom date range option requires that a specific day is selected within the calendar. The custom date range does not apply if no day is selected.

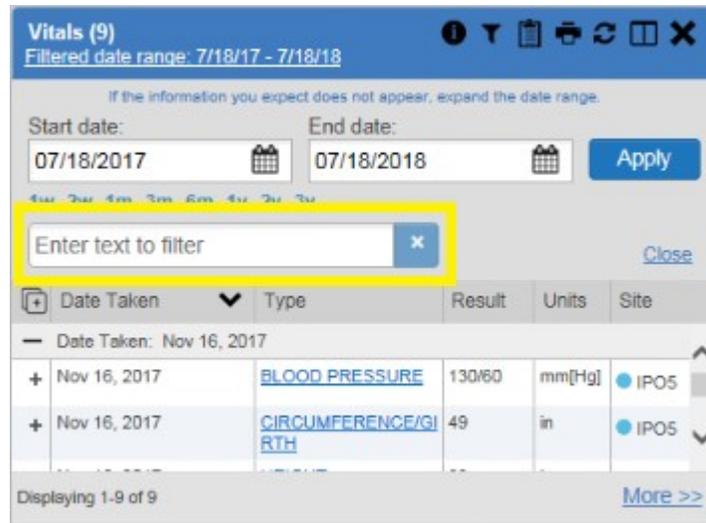
3. Click the **Calendar** icon next to **End Date**
4. Select the month, day, and year end date for the display filter
5. When both a start and end date have been chosen, click **Apply**

The widget refreshes and displays only the records that fall within the custom date range. The date range in use is displayed in the widget header.

4.4.2. Text Filter

Clinical data widgets on the **Patient** portal and the **Patient Flags and Postings** dialog box provide a text search filter option ([Figure 38](#)), allowing users to quickly locate relevant patient data using keywords or characters. Text searches are performed on the information displayed in all columns within a widget, including hidden columns. Searches are not performed on notes, attachments, or details associated with patient records.

Figure 38: Vitals Widget Text Filter



Click the **Configure Filter**  icon in the minimized view of a widget to display the **Enter text to filter** field. If the filter options are not displayed in the expanded view of the widget, clicking the **Configure Filter**  icon also opens the filter options. Keep in mind:

- Text filtering applies only to one widget
- Text searches are performed within the subset of filtered data if a date range filter or other dropdown filters are applied within the widget
- Text searches are performed on data within all columns shown in the expanded view of the widget even if the text is entered in the search field of the minimized view
- All records across the widget pages are searched if the widget has multiple page views
- The **Enter text to filter** field is not case sensitive and allows up to 25 characters, including numeric and special characters
- Text filtering is not available from the **Demographics** widget

4.5. Viewing Connection Status

JLV widgets display the status of their connection to VA and DoD data sources. Connection status information is available for each widget.

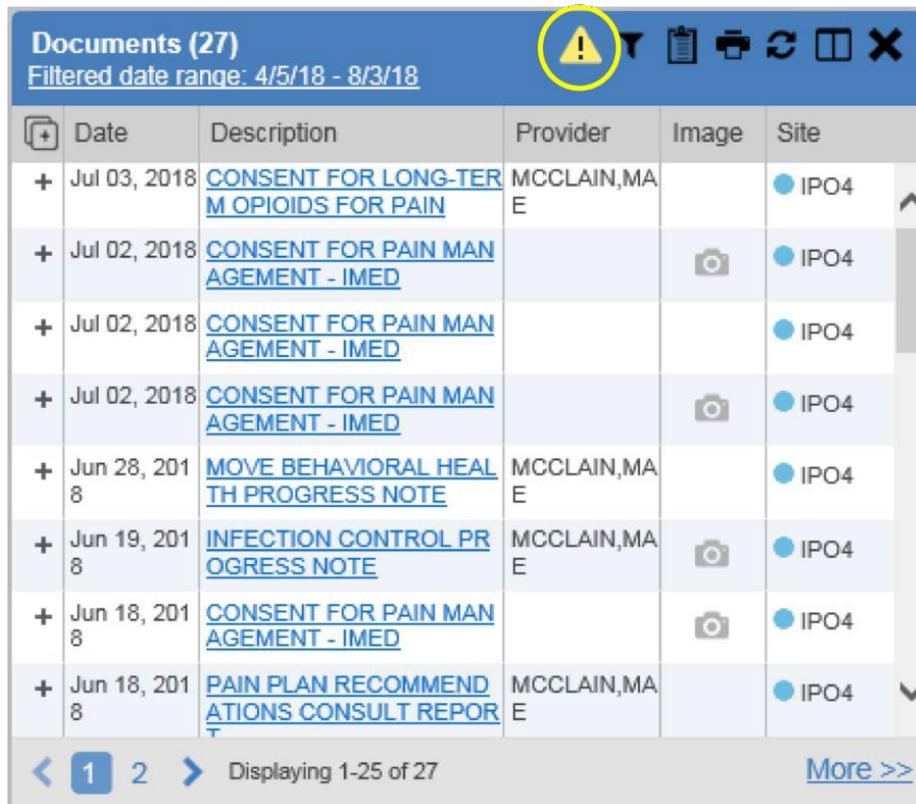
- i **NOTE:** The Connection Status reports the condition of the connection between JLV and its external resources, while System Status reports the overall condition of the JLV application. See [Viewing System Status](#) for more information.

The **Connection Status** icon on a widget toolbar indicates the state of the connection to VA and DoD data sources. There are two status conditions:

- i all sources are connected (available)
- ! one or more sources are not connected (unavailable)

[Figure 39](#) shows a connection status indicator icon displayed on the **Documents** widget toolbar.

Figure 39: Connection Status Indicator

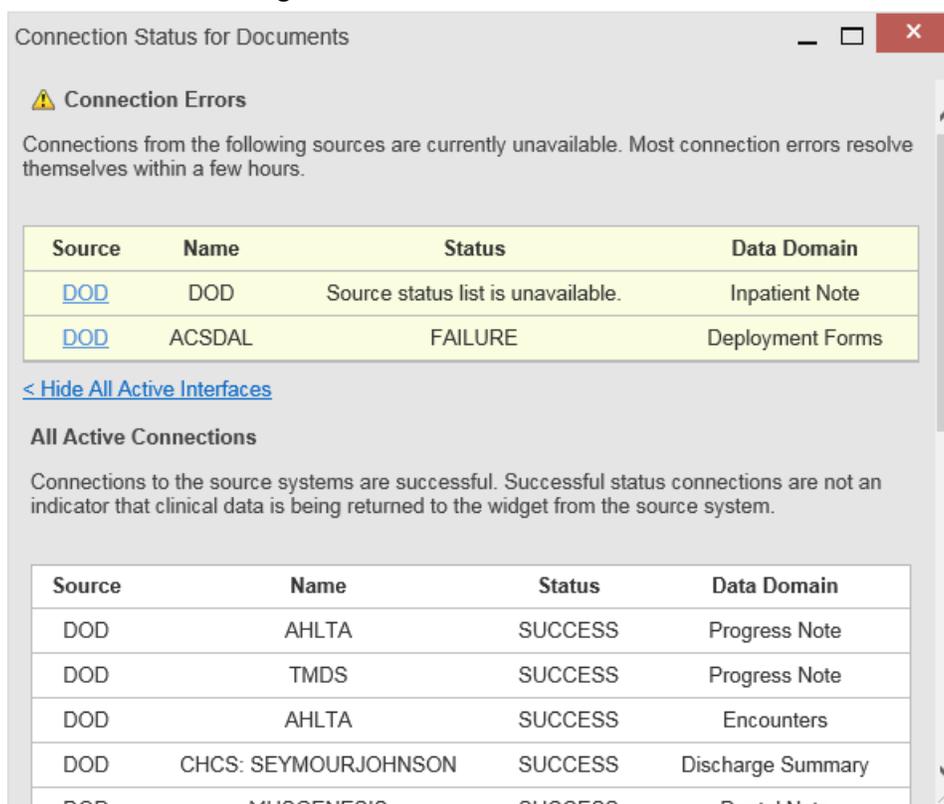


Documents (27)					
Filtered date range: 4/5/18 - 8/3/18					
	Date	Description	Provider	Image	Site
+	Jul 03, 2018	CONSENT FOR LONG-TERM OPIOIDS FOR PAIN	MCCLAIN, MAE		● IPO4
+	Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			● IPO4
+	Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			● IPO4
+	Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			● IPO4
+	Jun 28, 2018	MOVE BEHAVIORAL HEALTH PROGRESS NOTE	MCCLAIN, MAE		● IPO4
+	Jun 19, 2018	INFECTION CONTROL PROGRESS NOTE	MCCLAIN, MAE		● IPO4
+	Jun 18, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			● IPO4
+	Jun 18, 2018	PAIN PLAN RECOMMENDATIONS CONSULT REPORT	MCCLAIN, MAE		● IPO4

< 1 2 > Displaying 1-25 of 27 [More >>](#)

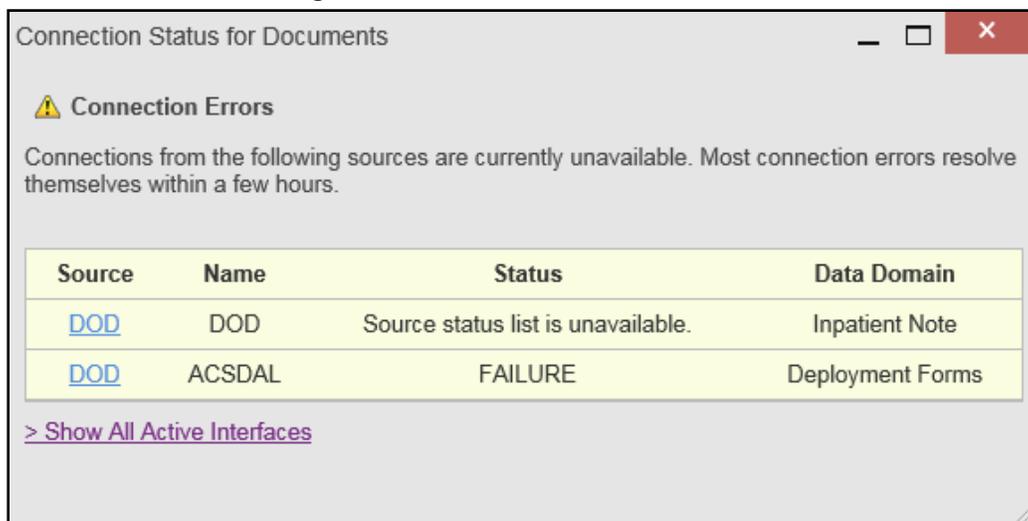
Clicking a **Connection Status** icon opens a standalone window with information about the connection to data sources ([Figure 39](#)). Clicking the **>Hide All Active Interfaces** link in the Connection Status window hides the detailed **All Active Connections** view and displays only the connection errors ([Figure 40](#)).

Figure 40: Connection Status Details



Clicking the **>Show All Active Interfaces** link in the **Connection Status** window ([Figure 41](#)) opens a **Connection Status Details** view ([Figure 40](#)).

Figure 41: Connection Status Window

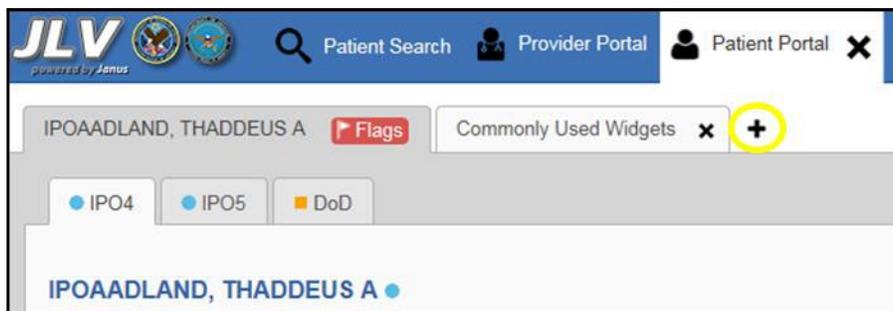


4.6. Displaying Widgets on Custom Tabs

You can use the *custom tabs* feature to create additional widget configurations for ease of use and quick reference. Changes made to portal page layouts (widget layouts and custom tabs) are saved to the user profile and are displayed in future sessions.

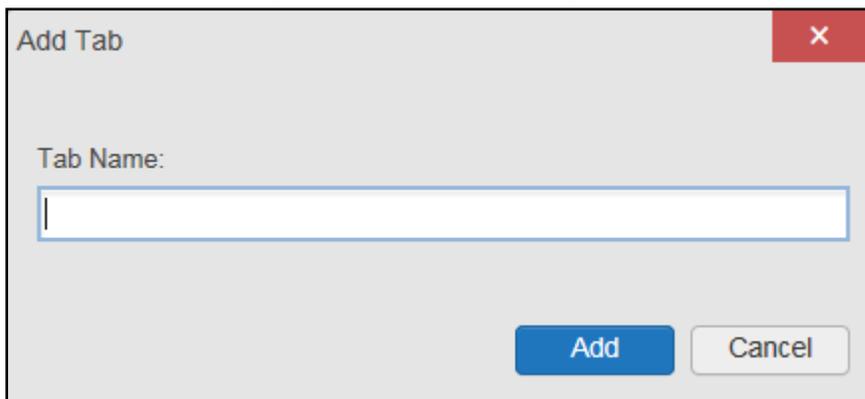
1. Click the plus sign + beside the existing tabs on the portal page ([Figure 42](#))

Figure 42: Add Custom Tab Icon



2. The **Add Tab** dialog box opens ([Figure 43](#))

Figure 43: Add Tab Dialog Box



3. Type the name of the new tab in the **Add Tab** dialog box and click **Add**
4. Click the **Open Widget Tray** link within the new tab space to display all available widgets
5. Click, hold, and drag each of the desired widgets to the screen

i **NOTE:** Tab configurations remain as set, until manually changed.

6. Click between tabs at any time, without losing each tab's configuration
 - a. Tab layouts persist, even when a patient change is made
 - b. Custom tabs can be renamed by double-clicking the tab name

4.7. Refreshing Data in a Widget

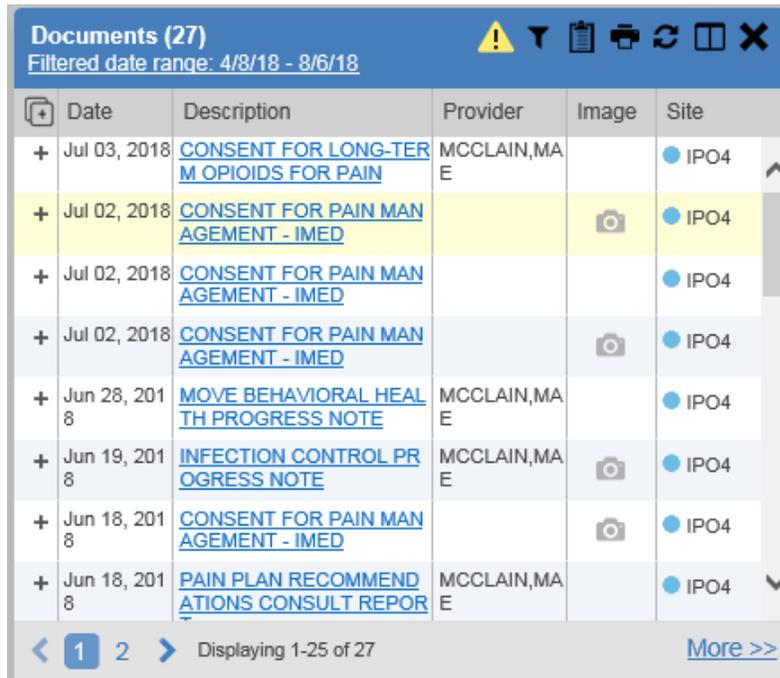
The data displayed in a widget can be refreshed by clicking the **Refresh** icon . This action retrieves data from VA and DoD sources and refreshes the individual widget's display.

4.8. VistA Imaging Viewer

JLV integrates access to the VistA Imaging Viewer (an external application), allowing VA users access to VA imaging artifacts for supported clinical domains (widgets). Users can open an instance of the VistA Imaging Viewer through JLV. Please see the [VistA Imaging SharePoint site](#) for more information regarding the VistA Imaging Viewer.

A **camera icon**  displayed in the **Image** column ([Figure 44](#)) of the **Documents**, **Outpatient Encounters**, **Procedures**, **Progress Notes**, and **Radiology Reports** widgets indicates that one or more images are associated with that record. Clicking the **camera icon**  within the widget opens the VistA Imaging Viewer in a standalone window and displays the associated image.

Figure 44: Camera Icon in the Image Column

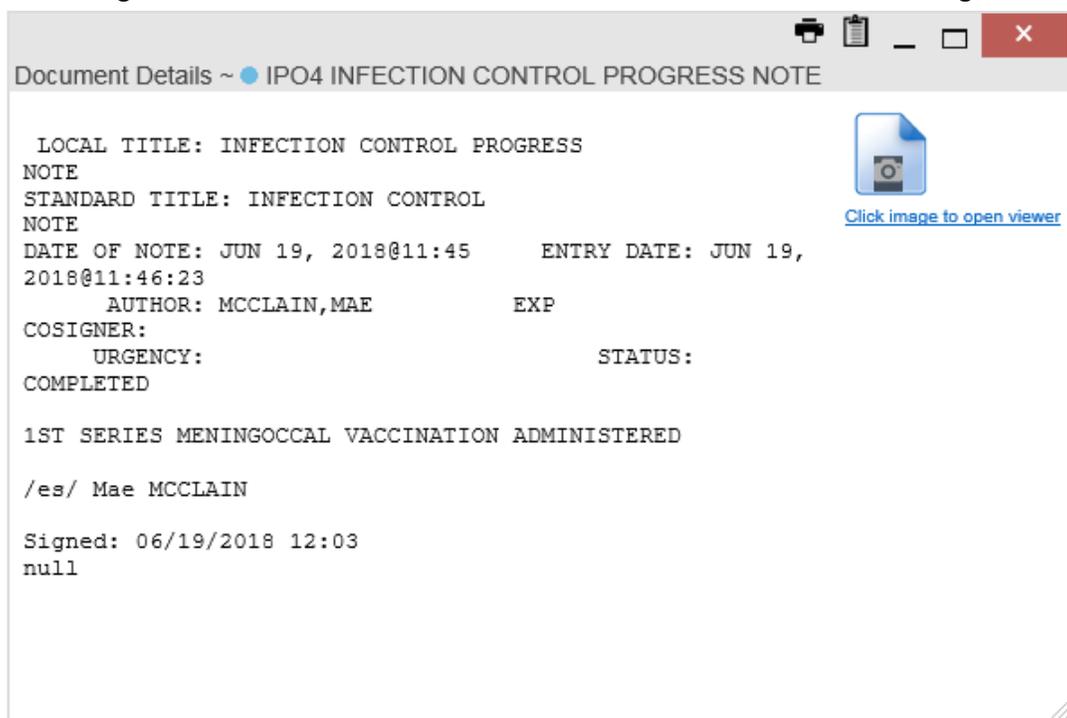


The screenshot shows a table titled "Documents (27)" with a filtered date range of "4/8/18 - 8/6/18". The table has columns for Date, Description, Provider, Image, and Site. The "Image" column contains a camera icon for records that have associated images. The "Site" column shows "IPO4" for all records. The table is displayed in a window with a blue header and a grey footer.

Date	Description	Provider	Image	Site
Jul 03, 2018	CONSENT FOR LONG-TERM OPIOIDS FOR PAIN	MCCLAIN, MAE		IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jun 28, 2018	MOVE BEHAVIORAL HEALTH PROGRESS NOTE	MCCLAIN, MAE		IPO4
Jun 19, 2018	INFECTION CONTROL PROGRESS NOTE	MCCLAIN, MAE		IPO4
Jun 18, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jun 18, 2018	PAIN PLAN RECOMMENDATIONS CONSULT REPORT	MCCLAIN, MAE		IPO4

If a record has one or more images associated with it, the **Details** view of the record includes a display of a thumbnail in the top-right corner of the window ([Figure 45](#)). Below the thumbnail, a link that reads, **Click image to open viewer**, is also displayed. Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

Figure 45: Thumbnail and Link in Details View of the Documents Widget



4.9. Using Report Builder

The **Report Builder** feature is used to create custom PDF reports using patient data and records displayed in JLV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the toolbar in the upper right corner of the **Patient Portal** (highlighted in [Figure 46](#)).

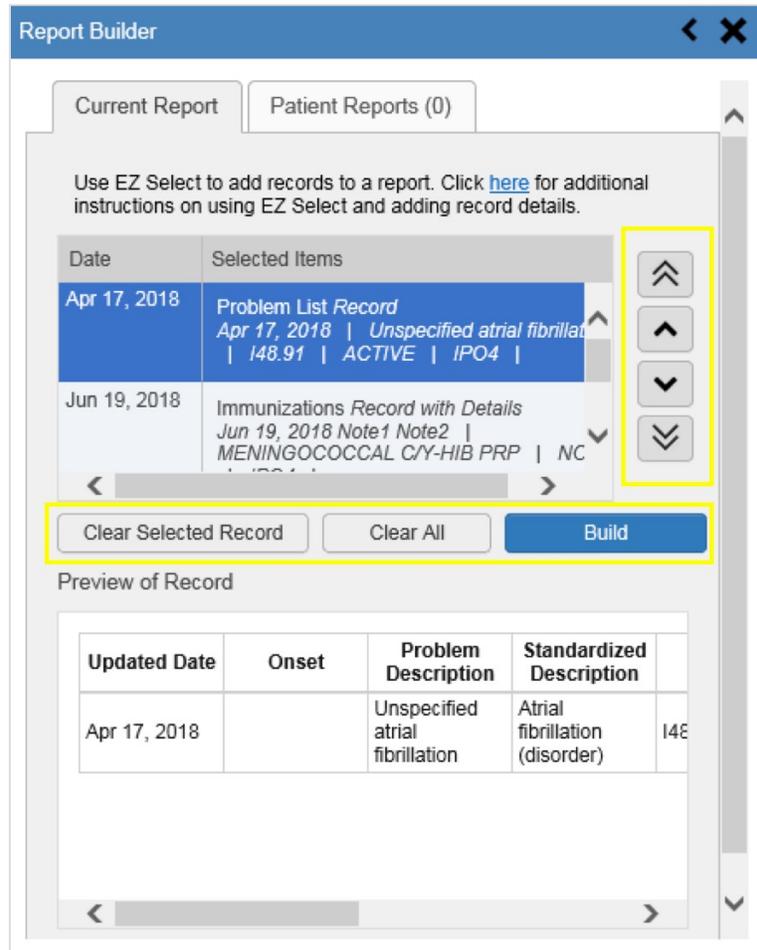
Figure 46: Report Builder Icon



The **Report Builder** pane is comprised of the **Current Report** tab ([Figure 47](#)) and the **Patient Reports** tab ([Figure 48](#)). When open, the **Report Builder** appears over the left side of the JLV portal window. To collapse or expand the **Report Builder**, click the left (collapse) < or right (expand) > arrow buttons. Any report configurations in progress are saved when collapsing or closing the Report Builder and restored when the Report Builder is displayed again.

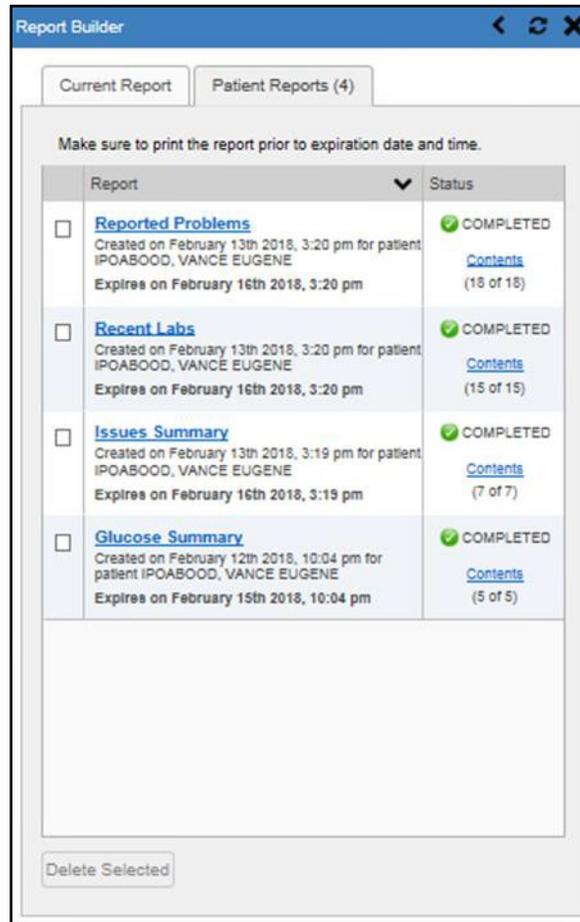
The **Current Report** tab ([Figure 47](#)) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

Figure 47: Current Report Tab



The **Patient Reports** tab ([Figure 48](#)) presents a list of all completed reports, the status of the report generation progress, the date the report expires, and a hyperlink to the contents of the completed report.

Figure 48: Patient Reports Tab



Actions within widgets to add patient data can be performed when the Report Builder is open on the Patient Portal or when it is closed. JLV enforces a maximum number of 50 records per report. A message appears when this limit is reached.

4.9.1. Adding Multiple Records with EZ Select

EZ Select allows you to add all records displayed in a single widget to the Report Builder with one click. Click the **Select All**  icon at the top of the left column ([Figure 49](#)) to add data from all records shown in the widget's page display to the Report Builder, including the details and notes associated with the record. EZ Select is available from the minimized and expanded views as well as the **Patient Flags and Postings** dialog box.

 **NOTE:** Sensitive records cannot be added using EZ Select and must be added one at a time.

Figure 49: Report Builder EZ Select

Problem List (16)						
Updated Date	Problem Description	ICD	Status	Type	Site	
+ May 25, 2018	Pulp degeneration	K04.2	ACTIVE		IPO4	+
+ May 25, 2018	Family history of tobacco abuse and dependence	Z81.2	ACTIVE		IPO4	+
+ Apr 17, 2018	Atherosclerotic heart disease of native coronary artery without angina pectoris	I25.10	ACTIVE		IPO4	+
+ Apr 17, 2018	Unspecified atrial fibrillation	I48.91	ACTIVE		IPO4	+

Displaying 1-16 of 16 [More >>](#)

The **Add to Report Builder** **+** icon in each row changes to the **Added to Report Builder** **RB** icon to confirm the record has been added ([Figure 50](#)).

Figure 50: Records Added to Report Builder

Problem List (16)						
Updated Date	Problem Description	ICD	Status	Type	Site	
RB May 25, 2018	Pulp degeneration	K04.2	ACTIVE		IPO4	RB
RB May 25, 2018	Family history of tobacco abuse and dependence	Z81.2	ACTIVE		IPO4	RB
RB Apr 17, 2018	Atherosclerotic heart disease of native coronary artery without angina pectoris	I25.10	ACTIVE		IPO4	RB
RB Apr 17, 2018	Unspecified atrial fibrillation	I48.91	ACTIVE		IPO4	RB

Displaying 1-16 of 16 [More >>](#)

i **NOTE:** Records previously added to a report remain in the Report Builder after a widget refresh. Clicking **Refresh**  in the widget refreshes the widget data display but does not restore the state of the **Added to Report Builder** **RB** icon in the left column if the record has been added to the Report Builder.

4.9.2. Adding Sensitive Records

Sensitive records can be added to the Report Builder by clicking the **Add to Report Builder +** icon next to the item in the widget. When prompted, click **Agree to be Audited & Access This Sensitive Record** to continue. The **Add to Report Builder +** icon in the row changes to the **Added to Report Builder**  icon to confirm the record has been added ([Figure 50](#)). Sensitive records must be added to the Report Builder individually; therefore, repeat as necessary for additional sensitive items.

4.9.3. Adding One Record

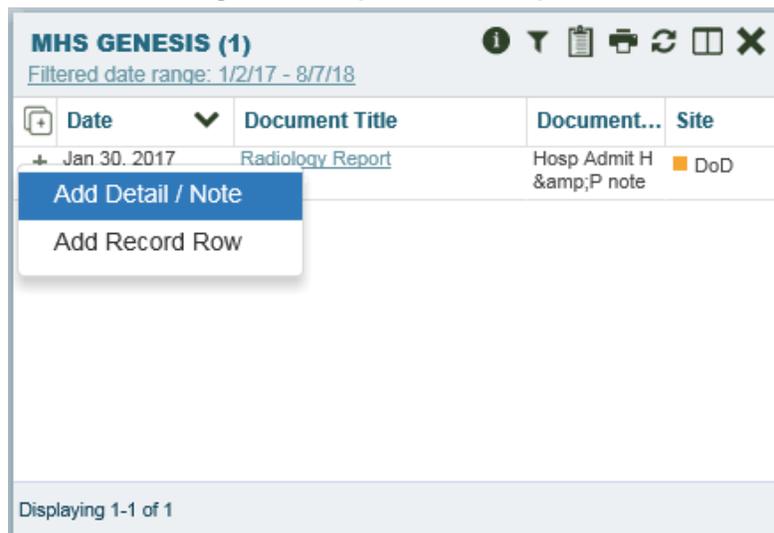
Click the **Add to Report Builder +** icon next to a record in a widget to add data from that record to the Report Builder, including the details and notes associated with the record. The **Add to Report Builder +** icon in the row changes to the **Added to Report Builder**  icon to confirm the record has been added to the Report Builder ([Figure 50](#)). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

4.9.4. Adding Only Record Details or Notes

When adding records to a report using the EZ Select **Select All**  icon or the **Add to Report Builder +** icon in the widget, JLV by default adds the data displayed in the widget as well as any details and notes associated with the record. This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box. If you would like to add just the details and notes or the record row data:

1. Select and hold the **Add to Report Builder +** icon to access these options ([Figure 51](#))
2. Select **Add Detail** or **Add Note** to add the details and/or notes associated with the record as well as the record row data to the Report Builder
3. Select the **Add Record Row** option to add only the data displayed in the widget display for that record and not the information provided in the details and/or notes

Figure 51: Report Builder Options

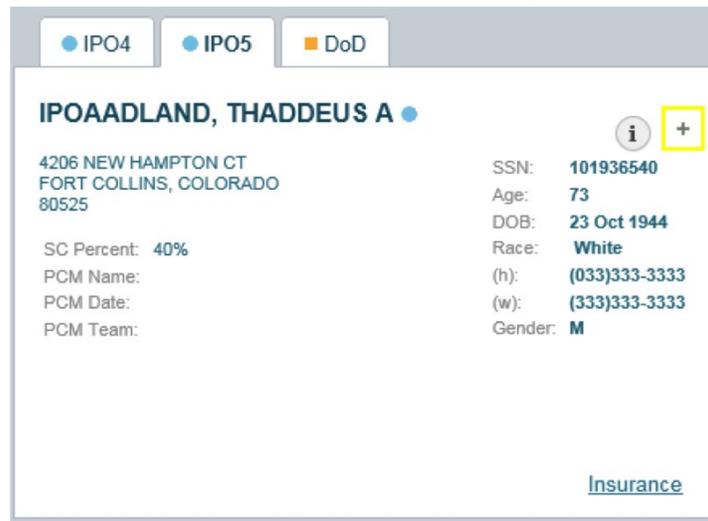


- i** **NOTE:** Once you add a record to Report Builder using either the **Add to Report Builder +** icon, **Add Detail/Note**, or **Add Record Row** option, you cannot change the record data included in the report without first clearing the record from the report and adding it again.

4.9.5. Adding Patient Demographics

Clicking the **Add to Report Builder +** icon in the top-right corner of the **Demographics** widget ([Figure 52](#)) adds the patient's demographics details for that site to the Report Builder. The **Add to Report Builder +** icon changes to the **Added to Report Builder**  icon to confirm the demographics data has been added. Click additional site tabs within the **Demographics** widget and repeat as desired to add demographics details from other sites within the patient's health record.

Figure 52: Demographics Widget Add to Report Builder Icon

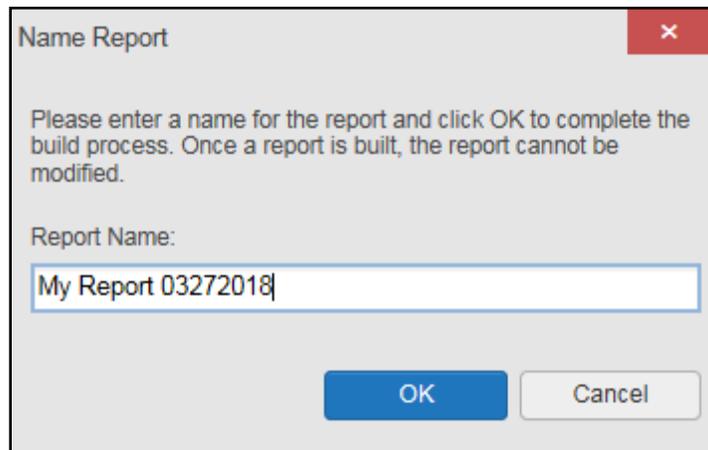


4.9.6. Generating a Report

The selected records appear in the **Report Builder** pane ([Figure 47](#)).

- Use the navigation arrows to the right of the listed records to arrange the records in the desired order in the generated report
 - Records can be removed by clicking **Clear Selected Record** or **Clear All**
- When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane
- Click **Build** to validate the selected records and prepare the report
 - If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column
 - If a record cannot be added to the report, an **Error** notation appears next to the record
- Name the report when prompted and click **OK** ([Figure 53](#))

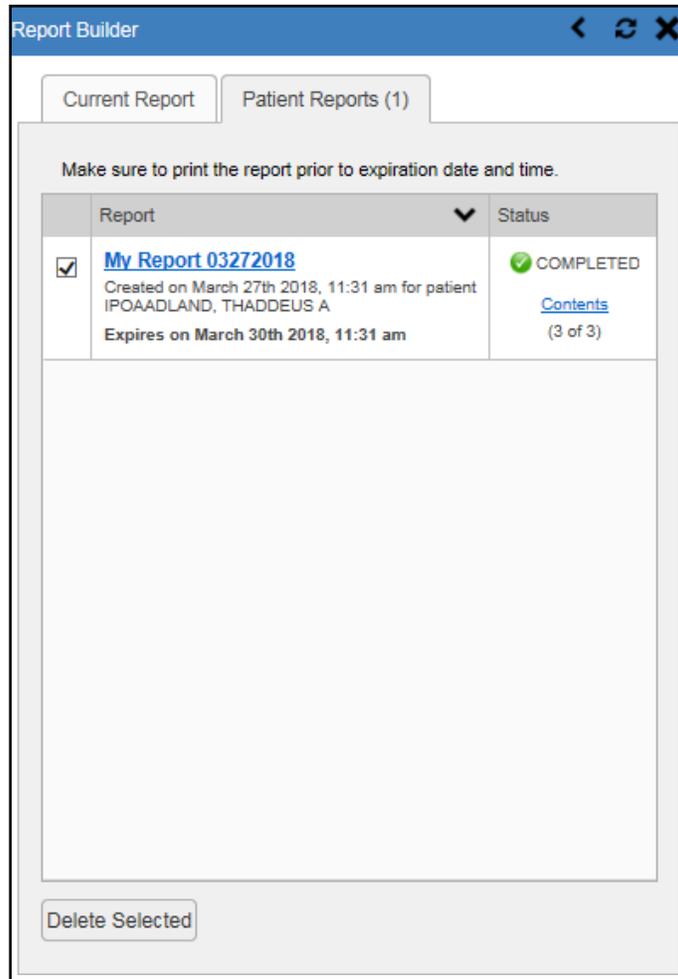
Figure 53 Name Report Dialog Box



The dialog box is titled "Name Report" and has a close button (X) in the top right corner. The main text reads: "Please enter a name for the report and click OK to complete the build process. Once a report is built, the report cannot be modified." Below this text is a label "Report Name:" followed by a text input field containing the text "My Report 03272018". At the bottom of the dialog box are two buttons: "OK" (a blue button) and "Cancel" (a light gray button).

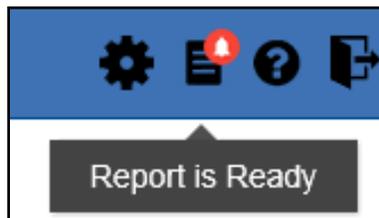
5. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column
6. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR* ([Figure 54](#))
 - a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
 - b. Both the *COMPLETED* and *ERROR* entries include a **Contents** link ([Figure 54](#)), which provides a list of the records that appear in the generated report

Figure 54: Patient Reports Tab Report Ready and Delete Option



- c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed ([Figure 55](#))
- d. A red icon ([Figure 55](#)) appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed

Figure 55: Report Ready Message and Indicator

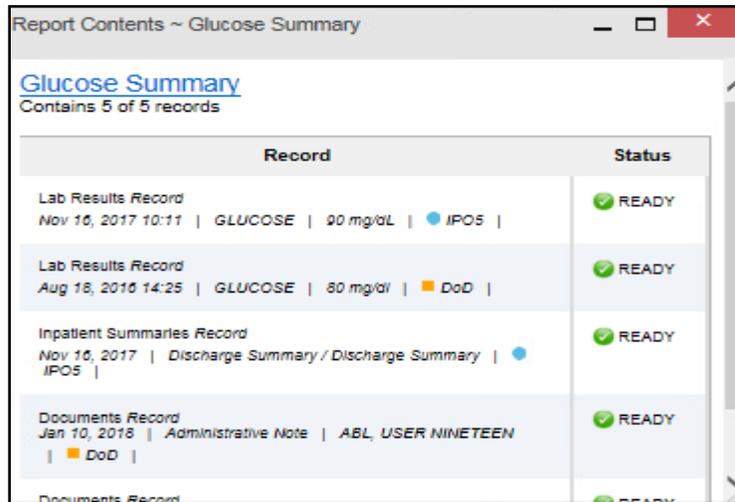


i **NOTE:** Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

4.9.7. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab ([Figure 54](#)) -OR-
2. Click the **Contents** link in the **Status** column of the **Patient Reports** tab to open a list of the records included in the report in the **Report Contents** window ([Figure 54](#)) -OR-
3. Click the blue, hyperlinked report name in the **Report Contents** window ([Figure 56](#))

Figure 56: Report Contents Window

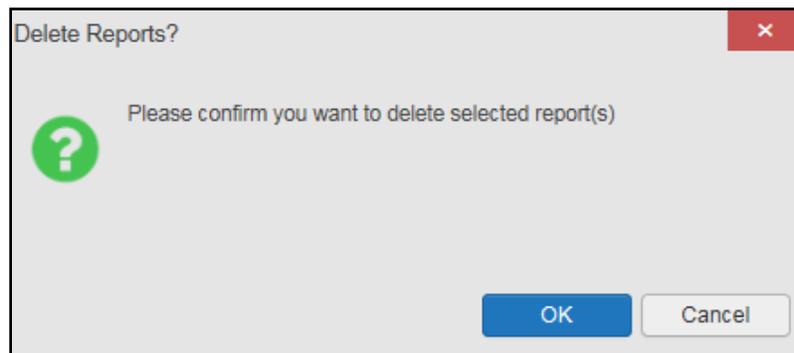


i **NOTE:** The Report Builder prints the report content to a file in PDF format. For the Report Builder and other JLV features, it is recommended that users have the latest Adobe Reader installed on the system from which they access JLV.

4.9.8. Delete a Report

1. Select the checkbox to the left of the report name on the **Patient Reports** tab ([Figure 54](#))
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion ([Figure 57](#))

Figure 57: Delete Reports Dialog Box



4.10. Printing

The data list of a widget in either minimized or expanded view, the details window of a widget, and reports created in **Report Builder** can be printed.

Click the **Print** icon  on the desired widget's toolbar to print the data list of a widget in either minimized or expanded view.

Click the **Print** icon  on the details window's toolbar to print the details window of a widget.

Click the (PDF) **Print** icon within the report window to print a report created in **Report Builder**.

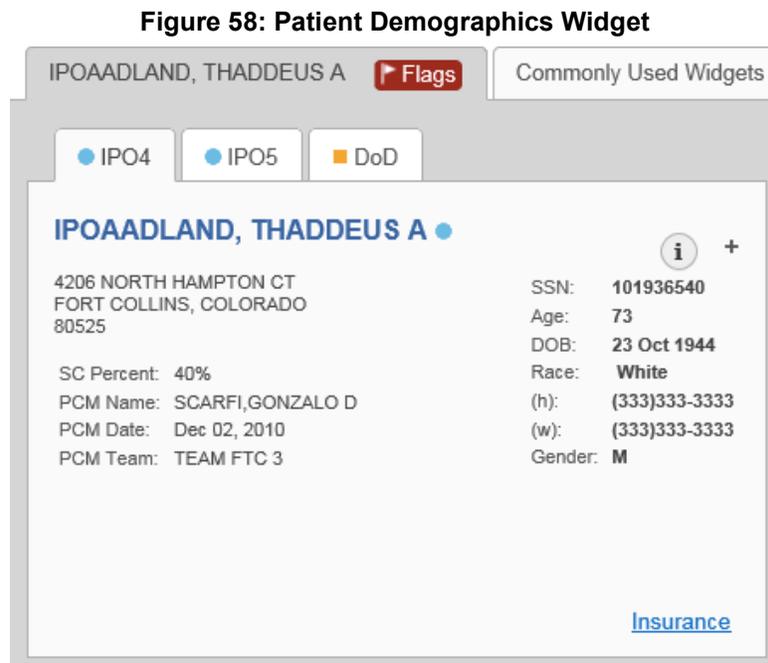
-  **NOTE:** Each report generated using **Report Builder** includes this disclaimer: *The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws.*

5. Widget Functionality

The following subsections detail the functionality in a sampling of the widgets available in JLV.

5.1. Patient Demographics Widget

The **Patient Demographics** widget displays a summary of the patient's non-clinical, personal data. The widget appears in the upper left section of the **Patient Portal** (Figure 58). The tabs above the patient's name provide a demographics summary for each site (VA or DoD) the patient has visited.



The **Patient Demographics** widget provides additional functionality and displays:

- Clicking the patient's name opens details in a standalone window
- Clicking a **Connection Status** icon   opens the connection status details in a separate window
- Clicking the **Flags** icon above the tabs in the widget opens clinical flag details in a new window

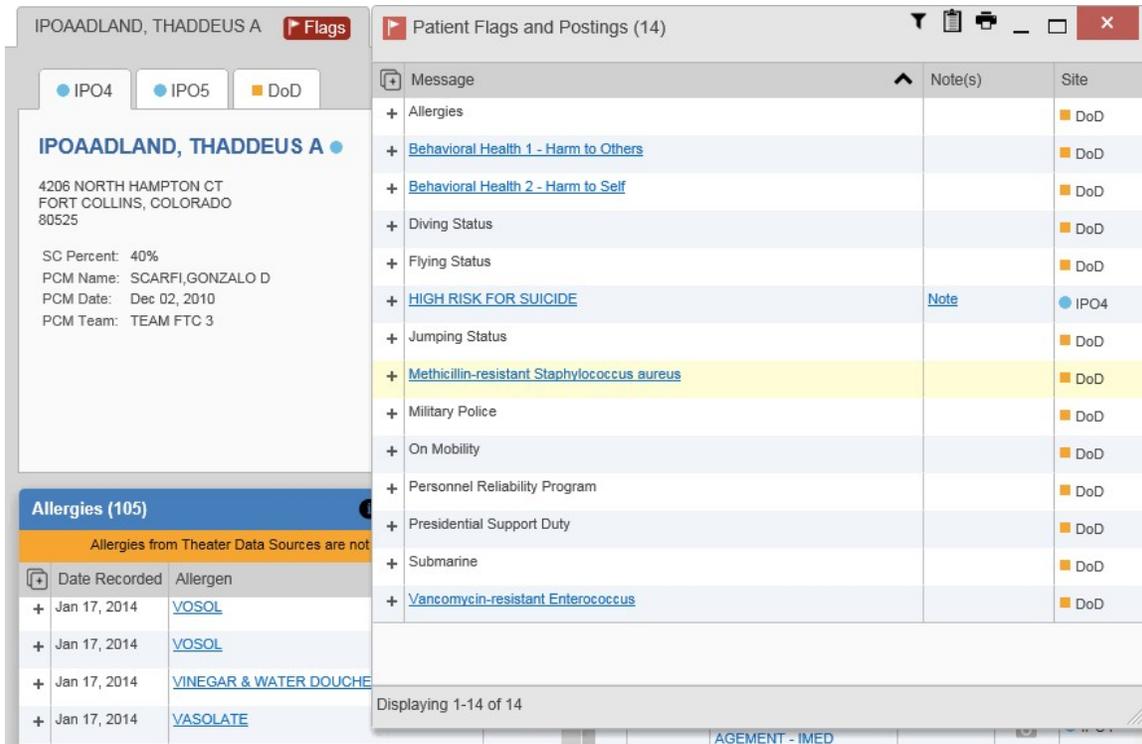
A **Warning** icon  that displays on one or more tabs within the **Demographics** widget is an indication that the patient is not registered at that VA site or DoD facility.

5.1.1. Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DoD sites, the **Flags** icon is displayed next to the **Patient Name** tab, above the **Demographics** widget, on the **Patient Portal** (Figure 59).

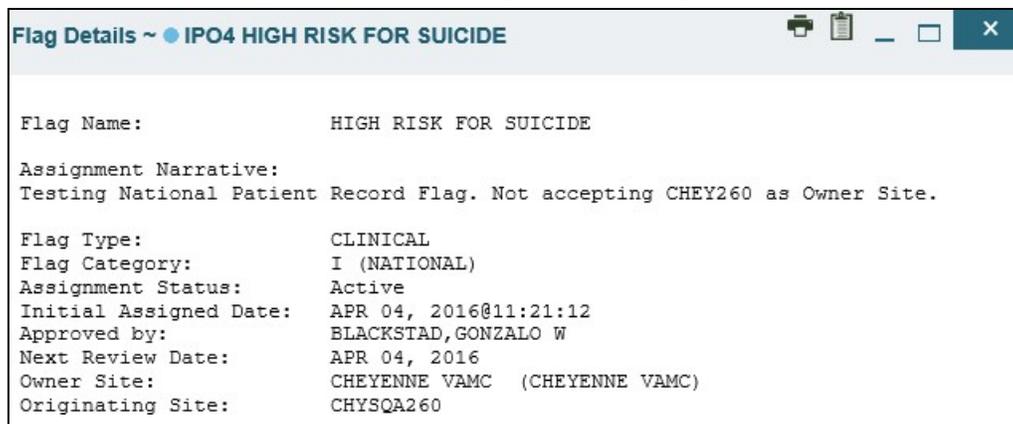
The **Patient Flags and Postings** window opens and displays by default when the **Patient Portal** opens, if there are warnings associated with the selected patient.

Figure 59: Patient Flags Indicator



Click the **Flags** icon to open the **Patient Flags and Postings** window (Figure 59). The window displays a list of alerts and flags within the patient’s record. Selecting the hyperlinked message for each patient alert opens the Flag Details window (Figure 60). Selecting the **Note** link (Figure 59) will open documents pertaining to placement of the flag. If the patient’s record does not contain any clinical warnings, the **Flags** icon is not displayed.

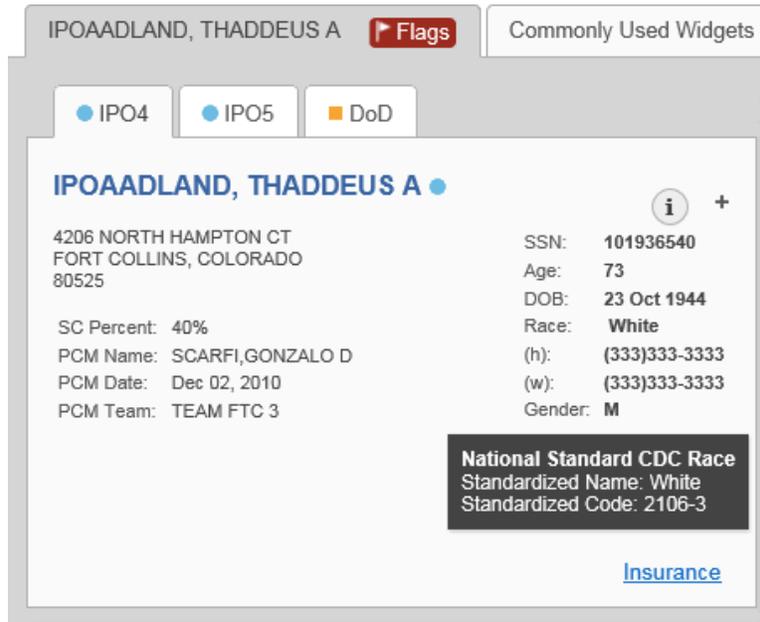
Figure 60: Patient Flags and Postings Details



5.1.2. Race Data Terminology Normalization

Race data from VA and DoD sources in the **Patient Demographics** widget is normalized. Hovering over the **Race** information displays the standardized name and code for the race classification, normalized to the Centers for Disease Control (CDC) standard ([Figure 61](#)).

Figure 61: Standardized Race Data



5.1.3. Viewing Third-Party Insurance Information

Third-party payers and insurance information is available from the **Patient Demographics** widget. Click the **Insurance** link in the **Demographics** widget. A new window opens with the following insurance information, some of which is displayed in [Figure 62](#):

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- RxBIN
- RxPCN
- Notes
- Comments

- Subscriber Date of Birth
- Subscriber’s Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information

Figure 62: Insurance Information

Health Plan Type	Health Plan Name	Standardized Insurance Type	Plan Effective Date	Plan Expiration Date	Site	Group Number
+ MEDICARE (M)	MEDICARE (WNR)	Medicare Primary	Sep 01, 2009		● IPO4	GRP NUM 9232
+ MEDICARE (M)	MEDICARE (WNR)	Medicare Primary	Sep 01, 2009		● IPO4	GRP NUM 9303
+ MEDIGAP PLAN C	MUTUAL O	Medicare Primary	Sep 01, 2009		● IPO4	GRP NUM 13129

Displaying 1-3 of 3

Use the horizontal scroll bar in the window to view the columns not seen within the default window size.

The data in the **Standardized Insurance Type** column is normalized to the X12 Health Insurance Type standard. Hovering over entries in this column display the standardized name and code for the insurance type ([Figure 62](#)).

5.2. Documents Widget

The **Documents**  widget ([Figure 63](#)) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Health Artifact and Image Management Solution (HAIMS) records. HAIMS records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images, displayed in chronological order by the document date.

Figure 63: Documents Widget, Minimized View

Date	Description	Provider	Image	Site
Jul 03, 2018	CONSENT FOR LONG-TERM OPIOIDS FOR PAIN	MCCLAIN, MAE		• IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			• IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			• IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			• IPO4
Jun 28, 2018	MOVE BEHAVIORAL HEALTH PROGRESS NOTE	MCCLAIN, MAE		• IPO4
Jun 19, 2018	INFECTION CONTROL PROGRESS NOTE	MCCLAIN, MAE		• IPO4
Jun 18, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			• IPO4
Jun 18, 2018	PAIN PLAN RECOMMENDATIONS CONSULT REPORT	MCCLAIN, MAE		• IPO4

5.2.1. Documents Widget Data

The minimized view of the **Documents** widget displays the following information:

- Date
- Description
- Provider
- Image
- Site

Outpatient encounter records displayed in the **Documents** widget may have a details link enabled in the **Date** column. Where available, click the link to open a **Details** window for records of this type.

The **Description** column displays the document title, where available. Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the widget to open the document.

A **camera** icon  in the **Image** column of the **Documents** widget indicates that one or more images are associated with that record. Clicking the **camera** icon opens the VistA Imaging Viewer in a standalone window and displays the associated image(s).

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view ([Figure 64](#)). Information in expanded view includes:

- Date
- Standardized Description
- Provider Specialty
- Description
- Provider
- Location

- Status
- Source System
- Image
- Site

Figure 64: Documents Widget, Expanded View

Documents (27)
Filtered date range: 4/9/18 - 8/7/18

If the information you expect does not appear, expand the date range.

Start date: 04/09/2018 End date: 08/07/2018 Apply 1w 2w 1m 3m 6m 1y 2y 3y

Filter by Description Filter by Standardized Description Filter by Provider Specialty Filter by Location

Filter by Source System Filter by Site

Enter text to filter Remove All Filters Close Filter

Date	Description	Standardized Description	Provider	Provider...	Location	Status	Im...	Source System	Site
Jul 03, 2018	CONSENT FOR LONG-TERM OPIOIDS FOR PAIN	Consent Document Patient	MCCLAIN, M AE	Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO 4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED	Consent Document Patient			CHYSQA260			VistA	IPO 4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED	Consent Document Patient			CHYSQA260			VistA	IPO 4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED	Consent Document Patient			CHYSQA260			VistA	IPO 4
Jun 28, 2018	MOVE BEHAVIORAL HEALTH PROGRESS NOTE	Multi-specialty program Note	MCCLAIN, M AE	Allopathic and Osteopathic Physicians	CHYSQA260			VistA	IPO 4
Jun 22, 2018	VIDEO							VistA	IPO 4

Displaying 1-25 of 27 Show All

5.2.2. Viewing Documents

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents** widget to access additional information for a listed record. Depending on the record type, the additional information may open in either a details window or a separate browser window. [Figure 65](#) displays outpatient encounters details, accessed through the **Documents** widget.

Figure 65: Details View of a Document



5.2.3. Viewing DoD Sensitive Data

JLV masks the display of sensitive records in the **Documents** widget. The record is masked with the tag ****Sensitive****. A user may view the data, but the action is audited each time the sensitive DoD record is viewed.

After clicking the hyperlink in the **Description** column for a sensitive record, JLV notifies the user that they will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects the purpose of viewing the record and agrees to be audited, the sensitive data appears in **Details** view, but the record remains masked in the minimized and expanded views of the widget.

5.2.4. Display and Filter Options

Display and filter options within the **Documents** widget include:

- Click a column title to sort records by that column
 - If a user sorts a column that appears in both minimized and expanded views of the widget, the sort is saved to the user profile, and appears in subsequent JLV sessions
 - If a user sorts a column that is only available in the expanded view of the widget, subsequent JLV sessions display the default widget sort, or the last sort saved to the user profile.
- Use the **Quick Date Range** selector, or the **Start Date** and **End Date** calendars, to specify the date range of records to be displayed within the widget
 - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

- When a date range filter is applied in an open widget, the date range is displayed in the widget header
- Open or close the filter options by clicking the date range in the header
- Click the **Column Settings** icon  on the widget toolbar to show or hide columns within the widget
 - Check/uncheck the column names that appear in the pop-up dialog box, then click **Apply**
- Use the **Filter by Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
- Use the **Filter by Standardized Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
- Use the **Filter by Provider Specialty** dropdown to redraw the widget and show only the records for the selected provider type(s) (Only available in expanded view)
- Use the **Filter by Location** dropdown to redraw the widget and show only the records for the selected location(s) (Only available in expanded view)
- Use the **Filter by Source System** dropdown to show only records from the selected source (Only available in expanded view)
- Use the **Filter by Site** dropdown to redraw the widget to show only the records for the selected site(s) (Only available in expanded view)
- Use the **Enter text to filter** field to filter information displayed in all columns within the widget, including hidden columns

5.2.5. Terminology Normalization

Terminology normalization in the **Documents** widget is provided through the following columns:

- The **Description** column displays the name of a note or document in the patient record
 - Hovering over an entry in this column displays the standard used for terminology normalization for the clinical domain (Logical Observation Identifiers Names and Codes [LOINC]) and the standardized LOINC name and code for that document
- The **Standardized Description** column displays the standardized name for the corresponding entry in the **Description** column, mapped to the LOINC standard
 - Hovering over an entry in this column displays the standard name, the standard used for terminology normalization for the clinical domain (LOINC), and the standardized code for that document
- The data in the **Provider and Provider Specialty** columns, in both the minimized and expanded views of the widget, is normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard
 - Hovering over entries in these columns displays the standardized name and code for the provider

[Figure 66](#) highlights a document mapped to the LOINC standard. The standardized name and code are displayed in the hover text over the record in the **Description** column.

Figure 66: Standardized Name and Code–Documents Widget

Date	Description	Provider	Image	Site
Jul 03, 2018	CONSENT FOR LONG-TERM OPIOIDS FOR PAIN	MCCLAIN, MAE		IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jul 02, 2018	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
Jun 28, 2018	MOVE BEHAVIORAL HEALTH PROGRESS NOTE	MCCLAIN, MAE		IPO4
	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
	CONSENT FOR PAIN MANAGEMENT - IMED			IPO4
	ACTIONS CONSULT REPORT			IPO4

Logical Observation Identifiers Names and Codes (LOINC)
 Standardized Name: Multi-specialty program Note
 Standardized Code: 68677-4

5.3. Community Health Summaries and Documents - VA

The **Community Health Summaries and Documents - VA** widget displays the patient’s VA VHIE community partner information, including Continuity of Care Documents (CCDs) in C32 and C62 formats, and HL7 Consolidated-Clinical Document (CCDA) structured documents available for the patient. The information in this widget is sorted by the title of the entry listed in the **Document** column.

NOTE: VBA (Claims) users cannot see the **Community Health Summaries and Documents - VA** widget.

5.3.1. Community Health Summaries and Documents - VA Widget Data

Data displayed within the **Community Health Summaries and Documents - VA** widget includes:

- Date
- Document
- Source

The purple hexagon beside entries in the **Source** column denotes the source of the data is outside the VA.

Figure 67: Community Health Summaries and Documents - VA, Minimized View

Date	Document	Source
Apr 27, 2017	ULT LEG UNI VENOUS D UPLEX	
Oct 25, 2017	Summarization of Episode Note	
Oct 25, 2017	Summarization of Episode Note	
Nov 22, 2016	Office Visit Summary	
Oct 25, 2017	Continuity of Care Document	
Apr 27, 2017	CHEST PA AND LATERA	

The **Site List** icon  on the toolbar in the **Community Health Summaries and Documents - VA** widget ([Figure 67](#)) generates a list of community sites where the patient has been seen.

Click the **Site List** icon  to open the full list of community sites where the patient has been seen. The site list content is gathered from the widget's **Source** column and the sites where the patient was seen, but no document was generated. Click **Close Site List** to remove the full site list from the widget display.

5.3.2. Viewing VA Community Health Summary Documents

The **Community and Health Summaries and Documents - VA** widget is rendered only in minimized view. Instead of an expanded view, the selected document opens in a new browser window ([Figure 68](#)).

[Figure 67](#) shows health summary records available from the **Document** column in the **Community Health Summaries and Documents - VA** widget. Clicking a hyperlinked entry in the **Document** column the document in a separate browser tab ([Figure 68](#)).

 **NOTE:** Multiple documents can be opened in separate browser tabs for simultaneous viewing and printing.

Figure 68: Community Health Document

Susquehanna Health System

Imaging

Created On: April 27, 2017

Patient:	NWHINFIVE NWHINZZTESTPATIENT 1500 TEST STREET HELENA, AL, 35080 tel: PATIENT PHONE MISSING	Patient ID: 700002
Birthdate:	January 5, 1985	Sex: M
Source:	Susquehanna Health System Author: STELTZ, MICHAEL	

Table of Contents

Attached File

EXAM: (MUS 1553) ULT LEG UNI VENOUS DUPLEX - LEFT -Accession #:
6749809
DATE AND TIME EXAM COMPLETED: Apr 27 2017 1:45PM
REASON FOR EXAM: pain

Venous Doppler of the leftlower extremity.
Indication: Hard lump just above the knee.
Comparison: None
TECHNIQUE: Gray-scale, pulsed Doppler and color Doppler images.
INTERPRETATION: No evidence of deep venous thrombus within the left
lower extremity.
At the area of interest ultrasound showed a small 3 x 3 mm cystic area in
the subcutaneous zone. Nonspecific but suspicious for benign sebaceous
cyst.
Also small popliteal cyst, 3 x 1 cm.

5.4. Military Health System (MHS) GENESIS Widget

The MHS GENESIS widget  displays DoD patient documents and dental summaries from the DoD's MHS GENESIS system. The information is displayed in reverse chronological order by date.

 **NOTE:** MHS GENESIS is a DoD data source. Users must enable DoD data sources to view data in this widget. If you opt to view only VA data sources, MHS GENESIS data is suppressed.

5.4.1. MHS GENESIS Widget Data

The minimized view of the MHS GENESIS widget includes the following orders information:

- Date
- Document Title
- Document Type
- Site

[Figure 69](#) highlights the **MHS GENESIS** widget in minimized view. There is no expanded view for the widget; instead, the CCDA document selected opens in a new browser window ([Figure 70](#)).

i **NOTE:** The **Outpatient Medications** widget displays an orange banner with a warning that reads, “*Duplicate DoD meds may be present*” due to the integration of data from MHS GENESIS.

Medical CCDs, Dental CCDs, and aggregate CCDs with blank entries in the **Date** column for the record appear first in the widget by default.

Figure 69: MHS GENESIS Widget

MHS GENESIS (1)				
Filtered date range: 1/2/17 - 8/7/18				
	Date	Document Title	Document...	Site
+	Jan 30, 2017	Radiology Report	Hosp Admit H & P note	DoD

Displaying 1-1 of 1

5.4.2. Viewing MHS GENESIS Documents

Click a hyperlink in the **Document** column in either view of the **MHS GENESIS** widget to display a Consolidated Clinical Document Architecture (CCDA) document ([Figure 70](#)) in a new browser window.

Figure 70: CCDA Document

JLV Patient Continuity of Care Document - Internet Explorer
 https://va.usdfeapp44.aac.dva.v... JLV Patient Continuity of Car... x

File Edit View Favorites Tools Help

Transition of Care/Referral Summary
 created on **February 28, 2017, 14:30:17**,
CST

**MB Military Baseline
 Medical Center**

Patient: CHDRONE
 CHDRZZTESTPATIENT
 DOB: March 3, 1960
 Gender: Male

[+] Table of Contents

Patient Information Encounters Vital Signs Problem Allergies Medications Results Immunizations Procedures
 Social History Functional Status Assessment and Plan Hospital Discharge Instructions Healthcare Providers Contact Information

[+] Patient Information

Patient Information	
Address	Primary Home: 1234 Howard St La Jolla, CA 92038- , US Tel: (760)222-5555
Marital status	
Religious Affiliation	
Race	Black or African American
Ethnicity	Not Hispanic or Latino
Language(s)	
Preferred Language	

[+] Encounters

2/17/17
 FC Fairchild Clinics 9 (9) -
 2/17/17

6. Troubleshooting

The following subsections provide information about troubleshooting common errors in JLV.

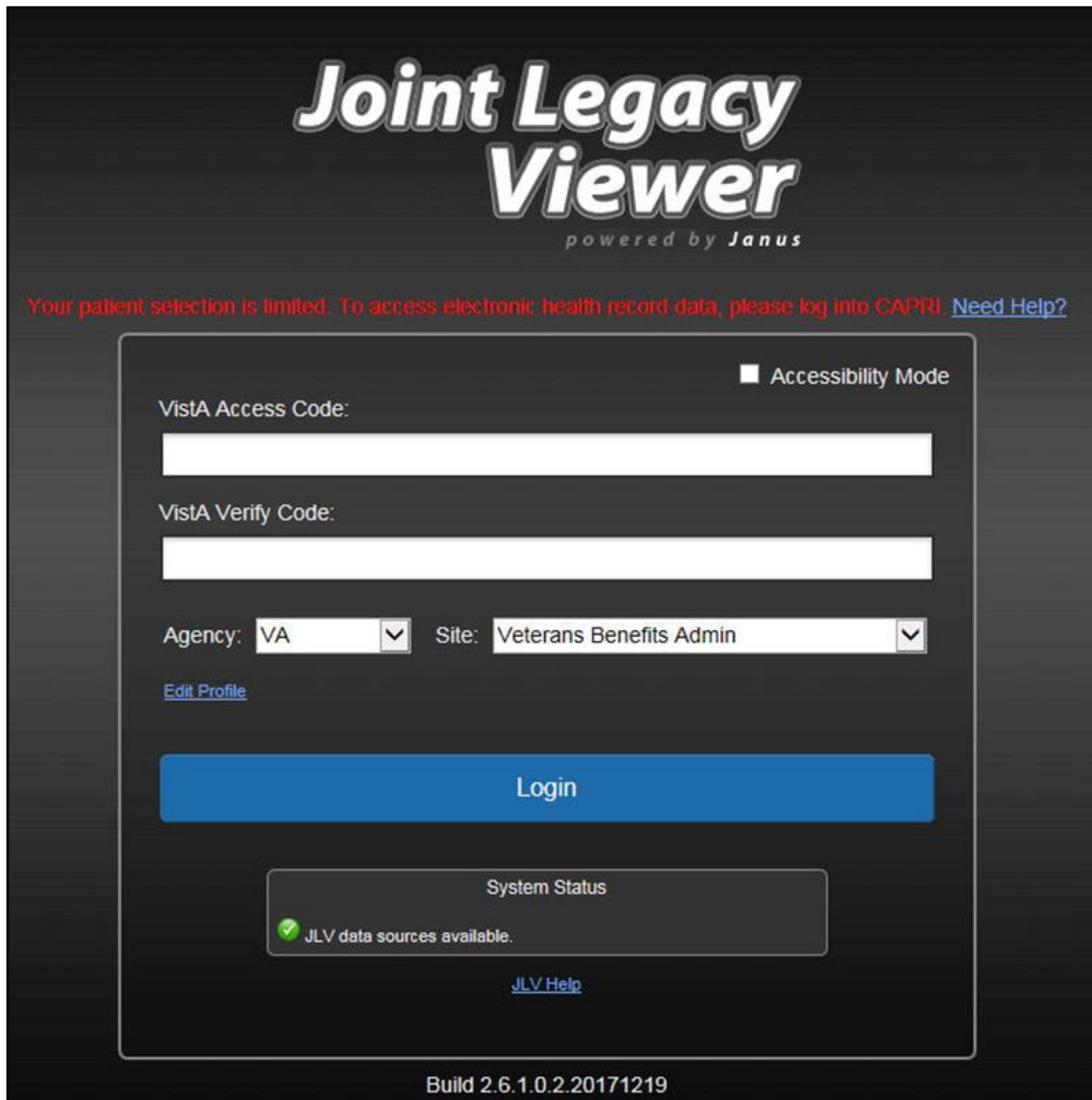
Please see online help for how-to information within JLV. Please visit [JLV Resources](#) to see JLV training videos and access additional JLV training materials.

6.1. Special Instructions for Error Correction

JLV utilizes access control and authentication services to limit access to registered, authorized users. When enabled, JLV validates a user against information retrieved from their Smart Card. If you are having trouble logging in to JLV, and have used the correct URL for your agency, please review the following before contacting the ESD:

Users with any CAPRI patient selection restrictions are *not* able to log in JLV. Instead, they see the message shown in [Figure 71](#) on the JLV Login page.

Figure 71: Login Error - CAPRI Patient Selection Restrictions



Joint Legacy Viewer
powered by Janus

Your patient selection is limited. To access electronic health record data, please log into CAPRI. [Need Help?](#)

Accessibility Mode

VistA Access Code:

VistA Verify Code:

Agency: Site:

[Edit Profile](#)

System Status
 JLV data sources available.

[JLV Help](#)

Build 2.6.1.0.2.20171219

VHA users:

- Have accessed JLV using the VHA URL (<https://jlv.med.va.gov/JLV>)
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV **Login** page
- Have selected a site from the **Site** dropdown list on the JLV **Login** page (Most users must specify the individual facility name or their parent healthcare system name)

VBA users:

- Have accessed JLV using the VBA URL (https://jlv.med.va.gov/JLV_Claims)
- Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV **Login** page

6.1.1. Login Page Error Messages

Troubleshooting steps for error messages received at the **Login** page are provided in [Table 6](#).

Table 6: Error Messages and Resolution Steps

Error Message	Resolution Steps
<p>Access denied. You are not an authorized user.</p>	<p>WHAT? You see the error message: <i>“Access Denied. You are not an authorized User.”</i></p> <p>WHY? There is a PIV card processing problem; the wrong security or an invalid security certificate was selected; or you are not an authorized user.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close your browser window 2) Reinsert your PIV card and relaunch JLV 3) Select a certificate that is not expired, and specifies: <i>“Issued by: Veterans Affairs CA B1”</i> 4) If unsuccessful, contact the ESD
<p>Could not save User Profile</p>	<p>WHAT? You receive the error message: <i>“Could not save User Profile.”</i></p> <p>WHY? The error occurred during PIV authentication. It is typically a PIV card processing problem, or the wrong security certificate is chosen.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close your browser window 2) Reinsert your PIV card and relaunch JLV 3) Select a certificate that is not expired, and specifies: <i>“Issued by: Veterans Affairs CA B1”</i> 4) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again
<p>Not a valid ACCESS/VERIFY CODE pair</p>	<p>WHAT? You see the error message: <i>“Not a valid ACCESS CODE/VERIFY CODE pair error at the login screen.”</i></p> <p>WHY? 1) JLV could not match your Access and Verify codes to the site selected in the dropdown, or 2) A username and password were entered instead of Access/Verify codes.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) VHA users must select the parent VistA host site for their facility 2) Reenter your Access and Verify codes (CAPRI codes for VBA users, CPRS codes for VHA users)

Error Message	Resolution Steps
<p>Page cannot be displayed</p>	<p>WHAT? You receive a, “<i>Page cannot be displayed,</i>” error when launching JLV. WHY? The JLV URL requires certain IE settings. FIX IT:</p> <ol style="list-style-type: none"> 1) Click the Tools menu (press ALT+X) in IE 2) Select Internet Options 3) When the dialog box opens, click the Advanced tab 4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked 5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked 6) Click OK to close the dialog box, then relaunch JLV (The page should load)
<p>Smart Card required</p>	<p>WHAT? You see the error message: “<i>Smart Card Required.</i>” WHY? Your Smart Card was not read by Windows Security and JLV before opening the JLV URL. FIX IT:</p> <ol style="list-style-type: none"> 1) Close all browser sessions and browser-based applications 2) Reinsert your PIV card, and relaunch the JLV URL 3) If unsuccessful, close all open IE windows/tabs, then Open IE and try JLV again
<p>VERIFY CODE must be changed before continued use</p>	<p>WHAT? You receive the message, “<i>VERIFY CODE must be changed before continued use,</i>” at the login screen. WHY? Your CPRS or CAPRI VERIFY CODE has expired. FIX IT:</p> <ol style="list-style-type: none"> 1) Open CPRS, VistA, or CAPRI (VBA users) <ol style="list-style-type: none"> a) If prompted for a PIV card certificate by CPRS, click Cancel 2) Select the Change Verify Code checkbox on the sign-on dialog before clicking OK 3) You are prompted to create a new Verify code 4) Once your Verify code has been changed for CPRS or CAPRI, relaunch JLV, which recognizes the new code immediately
<p>The JLV button in CPRS does nothing</p>	<p>WHAT? Clicking the JLV button in CPRS does not open JLV. WHY? You are likely using Google Chrome as your default browser. FIX IT:</p> <ol style="list-style-type: none"> 1) Click Start menu, then select Default Programs in the right pane 2) Click Set your default programs 3) Click Internet Explorer in the list, then click Set this program as default.

6.1.2. System Error Messages

[Table 7](#) summarizes system messages that may be presented to JLV users.

Table 7: System Error Messages

Message	Description
<i>No message displays but behavior occurs:</i> The browser window does not allow the user to scroll to widgets or access the JLV icons on the portal pages.	Access JLV using IE 11. Use a monitor with a minimum screen resolution of 1024 x 768. Set the browser zoom feature to 100%. If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log in to JLV again.
Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.	Either VistA Data Service or VistA Imaging Exchange is offline, and JLV is unable to retrieve the necessary data object to launch a VistA Imaging Viewer instance within JLV.
MVI Message: There are no patients found using the current parameters.	No patient records were found using the information entered in the Patient Search dialog box. Reenter patient identifiers in the Patient Search dialog box fields after verifying the accuracy of the information
MVI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.	No unique patient is found with the identifiers used in the search. Click OK to return to the Patient Search window and provide additional patient identifiers, like the full first name or DOB.
MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.	JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients. Modify the information in the Patient Search dialog box using additional patient identifiers to reduce the number of results.
MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.	There may be one or more errors in the Patient Search dialog fields. Validate the patient identifiers and try the search again. If problems persist, there may be an error between MVI and the Defense Enrollment Eligibility Reporting System (DEERS).
You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.	VA security regulations prevent a user from accessing their own medical records.
You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ACP Coordinator.	Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile.
An error occurred while attempting to retrieve the document.	Occurs when something goes wrong when JLV tries to retrieve a selected document.
An error occurred while attempting to display the document.	Occurs when JLV tries to receive a document, but has trouble converting the document to a viewable format.
Your patient selection is limited. To access electronic health record data, please log in to CAPRI.	Some VBA users have patient or site restrictions attached to their profile. Log in to CAPRI to view patient records.

Message	Description
<p>Connection Status alert or error displayed in the Community Health Summaries and Documents - VA widget:</p> <p>One or more data sources could not be connected; some entries will not appear.</p> <p>or</p> <p>Error: DAS Query failure. HTTP error.</p>	<p>These messages appear when the VA VHIE service is not available. If either message persists for more than 5 minutes, contact support to report the connection error.</p>
<p>Error displayed in Community Health Summaries and Documents - VA widget:</p> <p>Connection Error – No Data</p>	<p>JLV was unable to retrieve data from eHX.</p>
<p>Errors displayed in the Community Health Summaries and Documents - VA widget:</p> <p>An error occurred while attempting to retrieve the document.</p> <p>or</p> <p>An error occurred while attempting to display the document.</p>	<p>These error messages may appear when a user attempts to view a document, but JLV is either unable to retrieve it, or is unable to convert the document to HTML.</p>

6.1.3. VA VHIE Server Error Message

[Table 8](#) details an error that may be presented to JLV users, related to the display of VA VHIE data.

Table 8: Community Health Summaries and Documents - VA Widget Error Message

Message	Description
<p>An error occurred while attempting to retrieve the document.</p> <p>or</p> <p>An error occurred while attempting to display the document.</p>	<p>These messages may occur when you try to view a - VA widget, but JLV is either unable to retrieve the document, or JLV is unable to convert the document to HTML.</p>

A. Acronyms and Abbreviations

[Table 9](#) lists the acronyms and abbreviations used throughout this document and their descriptions.

Table 9: Acronyms and Abbreviations

Acronym	Description
CAPRI	Compensation and Pension Record Interchange
CCD	Continuity of Care Document
CCDA	Consolidated Clinical Document Architecture
CCOW	Clinical Context Object Workgroup
CDC	Centers for Disease Control
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
DEERS	Defense Enrollment Eligibility Reporting System
DOB	Date of Birth
DoD	Department of Defense
EDIPI	Electronic Data Interchange Personal Identifier
EHR	Electronic Health Record
eHX	eHealth Exchange
ESD	Enterprise Service Desk
GUI	Graphical User Interface
HAIMS	Healthcare Artifact and Image Management Solution
HL7	Health Level 7
ID	Identification
IE	Internet Explorer
IEN	Internal Entry Number
IP	Internet Protocol
JLV	Joint Legacy Viewer
LOINC	Logical Observation Identifiers Names and Codes
MHS	Military Health System
MI	Middle Initial
MVI	Master Veteran Index
NUCC	National Uniform Claim Committee
OIT	Office of Information and Technology
PDWS	Patient Discovery Web Service
PIV	Personal Identity Verification
SSL	Secure Sockets Layer
SSN	Social Security Number
TLS	Transport Layer Security
UI	User Interface

Acronym	Description
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VHIE	Veterans Health Information Exchange

B. Patient Portal Widgets, Columns, and Supported Views

[Table 10](#) details each data column within the minimized and expanded views of each widget. Data columns available in each view are ordered from left to right.

- An asterisk (*) next to a column title in the table indicates the data for that record is available in “detail view” from within the widget; clicking a link opens the contents of that record in a standalone window
- A dagger (†) next to a column title in the table indicates the data in that column is normalized (mapped to standards)

Table 10: Widget Details

Widget	Description	Minimized View	Expanded View
Admissions	Displays the patient’s inpatient admissions information including VA expanded admission discharge transfer history and detailed discharge diagnosis data	Adm Date* Discharge Date Diagnosis† Ward Site	Adm Date* Discharge Date Ward Provider† Diagnosis† Standardized Diagnosis† Registration Number Site
Allergies	Displays the patient’s allergy information	Date Recorded Allergen*† Site	Date Recorded Allergen*† Standardized Allergen† Reaction Severity Comments Site
Appointments	Displays the patient’s past and future appointments information	Scheduled Date/Time* Clinic Provider† ¹ Site	Scheduled Date/Time* Clinic Provider† ¹ Provider Specialty† ¹ Appointment Status Type Reason Site
Clinical Reminders - VA Only	Displays the patient’s clinical reminders information from VA sites	Due Last Done Reminder* Site	Due Last Done Reminder* Site
Community Health Summaries - VA	Displays the patient’s community health documents from VHIE partners including any CCDs, in C32 and C62 formats, and HL7 C-CDA structured documents	Date Document* Source	N/A
Consult Encounters	Displays the patient’s outpatient consult information	Date Consult Order* Status Site	Date Consult Order* Provider† Provider Specialty† Status Site

¹ Column hover display includes provider address and phone number.

Widget	Description	Minimized View	Expanded View
Demographics	Displays the patient's non-clinical or personal data including Patient Inquiry, Demographics, Insurance, Disabilities, and Primary Care assignments	The tabs above the patient's name provide a summary at site (VA or DoD) where the patient is registered	Click the patient name to open a separate window that provides patient demographic details (VistA patient inquiry for each VA site and DoD DEERS)
Documents	Displays documents from multiple clinical domains including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries, inpatient notes, questionnaires, and HAIMS and MHS GENESIS records	Date Description*† Provider† Image Site	Date Description*† Standardized Description† Provider† Provider Specialty† Location Status Image Source System Site
Health Summaries – VA Only	Displays the patient's national and local health summaries from VA sites where the patient has been registered	Description* Site	Description* Type Site
Immunizations	Displays the patient's immunization history, including skin test data where available in the patient's record	Vaccine Administered Date (Note[s]*) Vaccine Administered Product Type*† Adverse Vaccine Reaction Site (Reporting)	Vaccine Administered Date (Note[s]*) Vaccine Administered Product Type*† Standardized Vaccine Product Type† Series Immunization Result Adverse Vaccine Reaction Exemption/Refusal Reason Exemption/Refusal Date Site of Admin Site (Reporting) ²
Inpatient Medications	Displays a patient's inpatient medications information including inpatient infusions	Order Number Drug Name*† Status Order Stop Date Site	Order Number Order Start Date Order Stop Date Drug Name*† Standardized Drug Name† Status Ordering HCP† Ordering HCP Specialty† Schedule Quantity Site

² The **Immunizations** widget differentiates between the reporting site and the site of administration of a vaccine, and it includes a visual indicator when the two sites match.

Widget	Description	Minimized View	Expanded View
Inpatient Summaries	Displays the patient's discharge summaries, history, and physical summaries	Date Note Type/Title* Site	Date Note Type/Title* Provider† Provider Specialty† ³ Location Visit/Adm Date Status Site
Lab Panel Results	Displays the patient's lab panel results information by lab panel order with order details	Collection Date Order/Result* Site	Collection Date Order Number Order/Results* Ordering HCP† Ordering HCP Specialty† Sample Status Site
Lab Results	Displays the patient's lab results information by individual lab test for all test types as well as skin test data and blood bank (blood type testing and transfusion) history where available in the patient's record	Collection Date Lab Test*† Result* Site	Date Order Number Status Ordering HCP† Ordering HCP Specialty† Lab Test*† Standardized Lab Test*† Type Specimen Source Result* Interpretation Units Ref Range Site
MHS GENESIS	Displays patient documents and dental summaries from the MHS GENESIS system	Date Document Title* Document Type Site	N/A
Orders	Displays the patient's medication, consult, radiology, and lab orders	Order Date Description*† Status/Priority Type† Site	Order Date Order Number Description*† Status Type† Standardized Type† Provider† Provider Specialty† Site
Outpatient Encounters	Displays records of the patient's outpatient encounters	Encounter Date (Details* Note*) Clinic Provider† Diagnosis† Site	Encounter Date (Details* Note*) Clinic Status ⁴ Type Provider† Provider Specialty† Reason Diagnosis† Standardized Diagnosis† Site
Outpatient Medications	Displays the patient's outpatient medications information	Last Fill Drug Name*† Status Expires Site	Last Fill Drug Name*† Standardized Drug Name† Sig Quantity Days Supply Refills Left Status Ordering HCP† Ordering HCP Specialty† Expires Site

³ Data in the **Provider Specialty** column is populated with VA data only.

⁴ Data in the **Status** column is populated with DoD data only.

Widget	Description	Minimized View	Expanded View
Problem List	Displays the patient's problem list information	Updated Date Problem Description*† ICD Status Type Site	Updated Date Onset Problem Description*† Standardized Description† ICD Severity Type Status Site
Procedures	Displays the patient's procedures for all Current Procedural Terminology (CPT) codes	Procedure Date (Note[s])* Location ⁵ Provider† Procedure Description† Image Site ⁶	Procedure Date (Note[s])* Location ⁵ Provider† Provider Specialty† CPT Code Procedure Description† Standardized Procedure Description† Image Site ⁶
Progress Notes	Displays the patient's progress notes information as well as advance directives, clinical warnings, and crisis notes	Date Document Type/Title*† Provider† Image Site	Date Document Type/Title*† Standardized Document Type† Provider† Provider Specialty† Clinic Image Site
Questionnaires and Deployment Assessments (AHLTA Only)	Displays the patient's history of questionnaires and DoD pre- and post-deployment assessments	Date Document Title*† Site	Date Entered By Document Title*† Standardized Document Title† Site
Radiology Reports	Displays the patient's radiology exams information	Date Exam*† Image Site	Date Exam Number Exam*† Standardized Radiology Exam† CPT Description† Status Results Image Site
Social, Family, and Other Past Histories	Displays the patient's history records from DoD only	Date Reported Type Findings Status Site	Date Reported Type Findings† Standardized Findings Comments Status Site
Vitals	Displays the patient's vital signs information from inpatient or outpatient settings	Date Taken Type*† Result Units Site	Date Taken Type*† Standardized Type† Result Units Site

⁵ **Location** represents a ward or clinic within a given DoD or VA facility where the procedure took place.

⁶ **Site** represents the source of procedure (i.e., VA or DoD). **Site** is not the same as **Location** or **Facility**.